Defense Information Systems Agency
Department of Defense

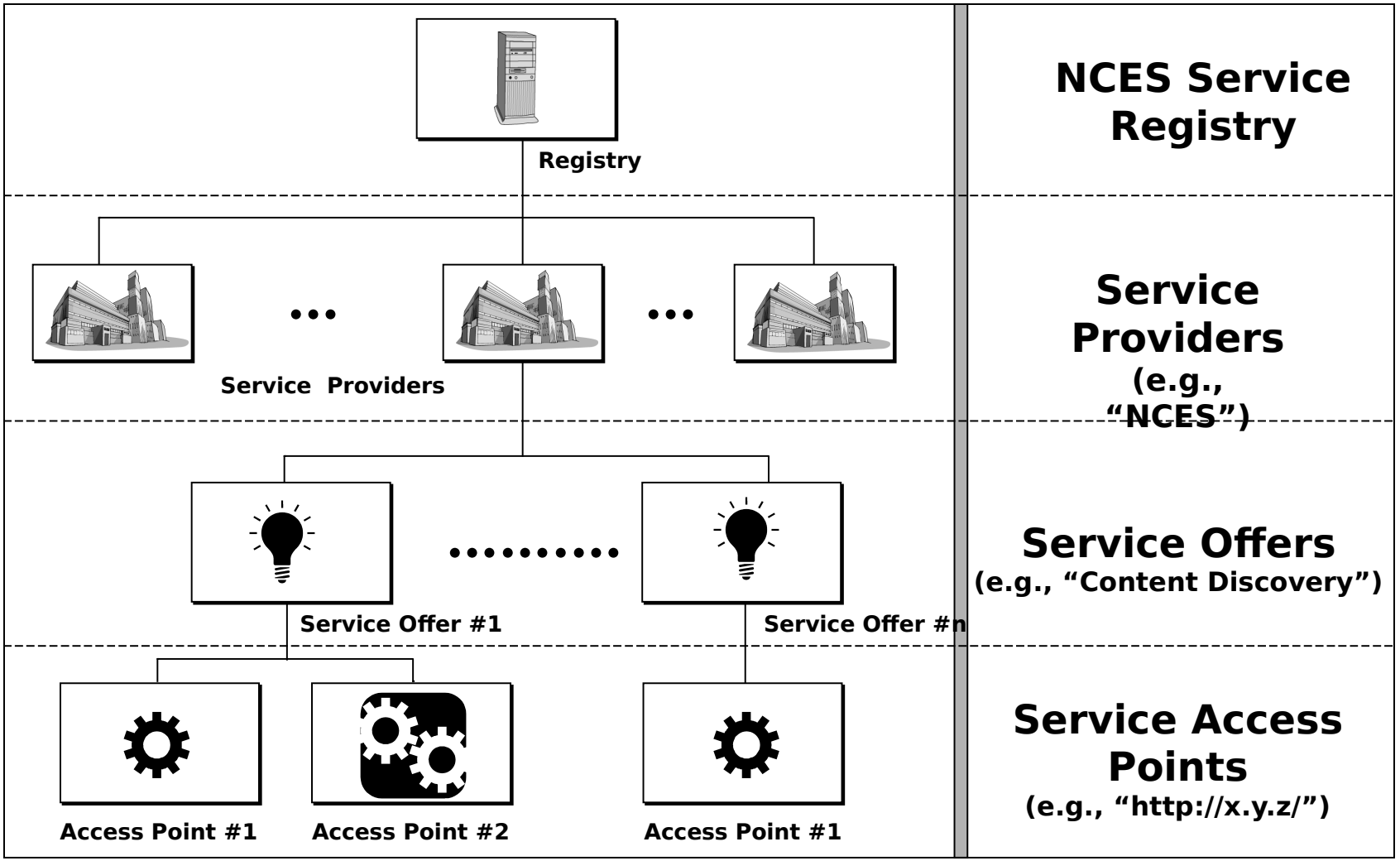
NCES Service Discovery Help Guide (v0.4.4)

Prepared by Booz Allen Hamilton
18 December 2006

Purpose of This Help Guide

- **This help Guide is intended to be used as a quick reference to NCES Service Discovery capabilities.**
- **Each capability will illustrated by screen shots and high level instructions on how to use the capability.**
- **This briefing can be used in two ways:**
  - **As a reference guide to aid people on the phone or via email**
  - **To walk someone through the process of using Service Discovery**

Registry Hierarchy & Terms



New Functionality and Enhancements in Service Discovery v0.4.4

- General Enhancements:
  - Create and manage service providers in the registry
  - Support service provider categorization
  - Assign and manage authorized users to publish services on the service provider's behalf. This is known as "Delegated Administration"

- Publishing Enhancements:
  - Allow only authorized users to publish services
  - Create service security policy
  - Assign authorized users for management of published services
  - Support service instance categorization

- Service Editing Enhancements:
  - Manage service security policy
  - Manage the users authorized to manage a published service
  - Manage the categorization of service instances
  - Add service instances to a published service

- Service Browser / Service Search Enhancements:
  - Search by service name, provider, categorization, and service instance port type

NCES Service Registry Contents

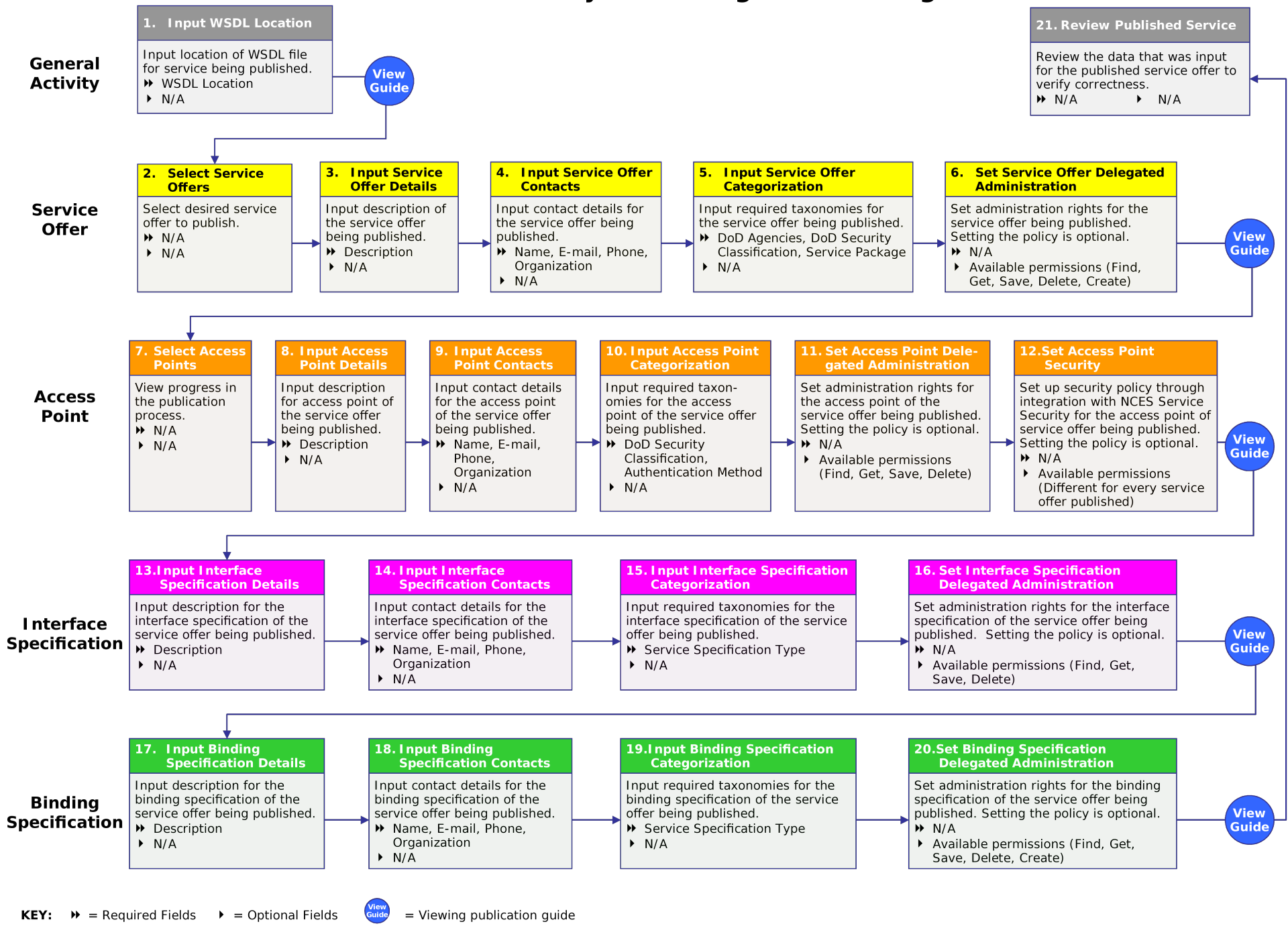
- **NCES Service Registry Home** – Contains a Quick Search box for finding Service Offers, and general information on how to use the NCES Service Registry.
- **Browse by Service Provider** – Allows user to browse through the Service Offers in the NCES Service Registry, organized by the Service Provider under which they are published.
- **Browse by Category** – Allows user to browse through the Service Offers in the NCES Service Registry, organized by their Categorization.
- **Administration** - Management functionality that allows the user to search for, create, edit, and delete service providers, service offers, and access points.
- **Advanced Search** - Perform an advanced search on the Service Offers in the NCES Service Registry.

Note: This help guide only contains the features listed above. There are additional features of Service Discovery that exist which may be added to this document at a future date.

Other Resources Available

- NCES Service Publishing Guide
  - Describes in text the step-by-step process to publish a service provider, service offer, and service access point.
- NCES Service Discovery CONOPS
  - Provides a general overview of NCES Service Discovery and its CONOPS.

Service Discovery Publishing Process Diagram


General Activity
1. Input WSDL Location
Input location of WSDL file for service being published.
WSDL Location
N/A
View Guide
21. Review Published Service
Review the data that was input for the published service offer to verify correctness.
N/A
N/A
Service Offer
2. Select Service Offers
Select desired service offer to publish.
N/A
N/A
3. Input Service Offer Details
Input description of the service offer being published.
Description
N/A
4. Input Service Offer Contacts
Input contact details for the service offer being published.
Name, E-mail, Phone, Organization
N/A
5. Input Service Offer Categorization
Input required taxonomies for the service offer being published.
DoD Agencies, DoD Security Classification, Service Package
N/A
6. Set Service Offer Delegated Administration
Set administration rights for the service offer being published. Setting the policy is optional.
N/A
Available permissions (Find, Get, Save, Delete, Create)
View Guide
Access Point
7. Select Access Points
View progress in the publication process.
N/A
N/A
8. Input Access Point Details
Input description for access point of the service offer being published.
Description
N/A
9. Input Access Point Contacts
Input contact details for the access point of the service offer being published.
Name, E-mail, Phone, Organization
N/A
10. Input Access Point Categorization
Input required taxonomies for the access point of the service offer being published.
DoD Security Classification, Authentication Method
N/A
11. Set Access Point Delegated Administration
Set administration rights for the access point of the service offer being published. Setting the policy is optional.
N/A
Available permissions (Find, Get, Save, Delete)
12.Set Access Point Security
Set up security policy through integration with NCES Service Security for the access point of service offer being published. Setting the policy is optional.
N/A
Available permissions (Different for every service offer published)
View Guide
Interface Specification
13.Input Interface Specification Details
Input description for the interface specification of the service offer being published.
Description
N/A
14. Input Interface Specification Contacts
Input contact details for the interface specification of the service offer being published.
Name, E-mail, Phone, Organization
N/A
15. Input Interface Specification Categorization
Input required taxonomies for the interface specification of the service offer being published.
Service Specification Type
N/A
16. Set Interface Specification Delegated Administration
Set administration rights for the interface specification of the service offer being published. Setting the policy is optional.
N/A
Available permissions (Find, Get, Save, Delete)
View Guide
Binding Specification
17. Input Binding Specification Details
Input description for the binding specification of the service offer being published.
Description
N/A
18. Input Binding Specification Contacts
Input contact details for the binding specification of the service offer being published.
Name, E-mail, Phone, Organization
N/A
19.Input Binding Specification Categorization
Input required taxonomies for the binding specification of the service offer being published.
Service Specification Type
N/A
20.Set Binding Specification Delegated Administration
Set administration rights for the binding specification of the service offer being published. Setting the policy is optional.
N/A
Available permissions (Find, Get, Save, Delete, Create)
View Guide
KEY: = Required Fields = Optional Fields View Guide = Viewing publication guide

Help Guide Features

This help guide provides step-by step instructions with screenshots for the following features of the NCES Service Registry. Click on a link to jump right to that section:

Browse / Search Registry

- Browse by Service Provider
- Browse by Service Category
- Advanced Search

Service Providers

- Publish a Service Provider
- Edit a Service Provider
- View a Service Provider
- Delete a Service Provider

Service Offers

- Publish a Service Offer
- Edit a Service Offer
- View a Service Offer
- Delete a Service Offer

Others

- Service Categorization
- Delegated Administration
- Access Point Security

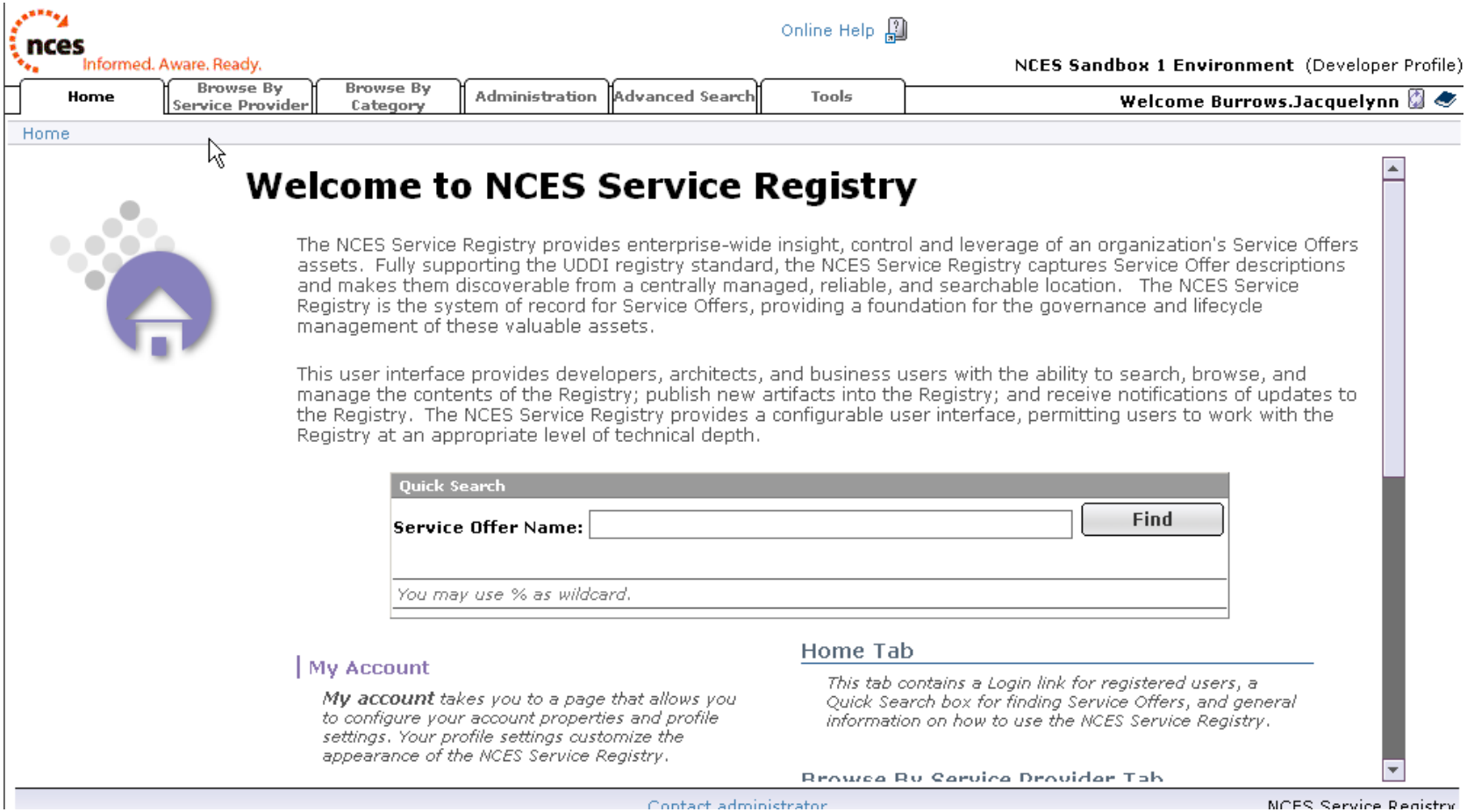
Access Points

- Publish an Access Point

Home Tab

This tab contains a Quick Search box for finding Service Offers, and general information on how to use the NCES Service Registry.

NCES Service Registry

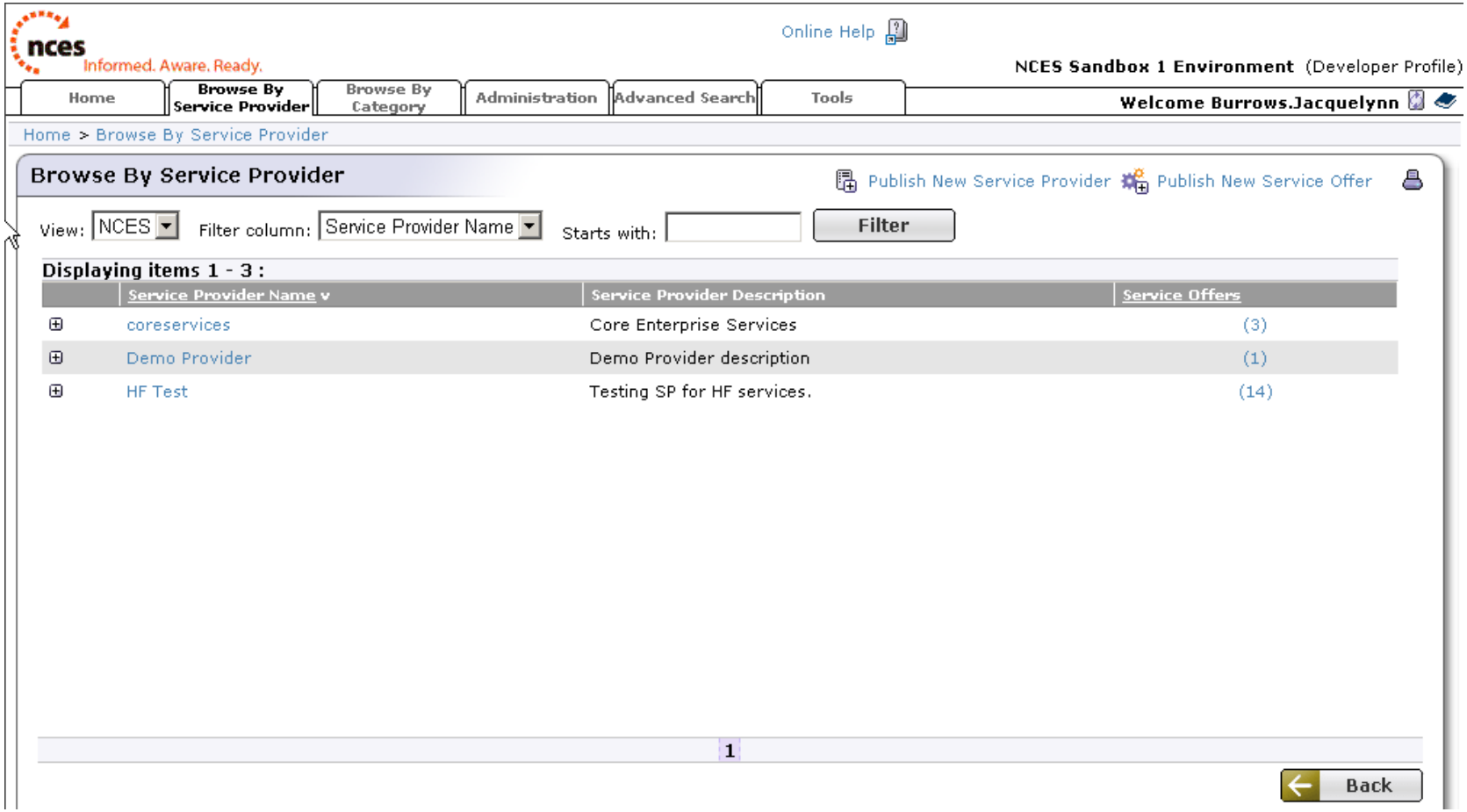

nces
Informed. Aware. Ready.
Online Help
NCES Sandbox 1 Environment (Developer Profile)
Home
Browse By Service Provider
Browse By Category
Administration
Advanced Search
Tools
Welcome Burrows.Jacquelynn
Home
Welcome to NCES Service Registry
The NCES Service Registry provides enterprise-wide insight, control and leverage of an organization's Service Offers assets. Fully supporting the UDDI registry standard, the NCES Service Registry captures Service Offer descriptions and makes them discoverable from a centrally managed, reliable, and searchable location. The NCES Service Registry is the system of record for Service Offers, providing a foundation for the governance and lifecycle management of these valuable assets.
This user interface provides developers, architects, and business users with the ability to search, browse, and manage the contents of the Registry; publish new artifacts into the Registry; and receive notifications of updates to the Registry. The NCES Service Registry provides a configurable user interface, permitting users to work with the Registry at an appropriate level of technical depth.
Quick Search
Service Offer Name:
Find
You may use % as wildcard.
My Account
My account takes you to a page that allows you to configure your account properties and profile settings. Your profile settings customize the appearance of the NCES Service Registry.
Home Tab
This tab contains a Login link for registered users, a Quick Search box for finding Service Offers, and general information on how to use the NCES Service Registry.
Browse By Service Provider Tab
Contact administrator
NCES Service Registry

- **This screenshot shows the NCES Service Registry home page. This page describes the various tabs and functions that are available in the system and also offers brief descriptions of each component.**

Browse By Service Provider Tab

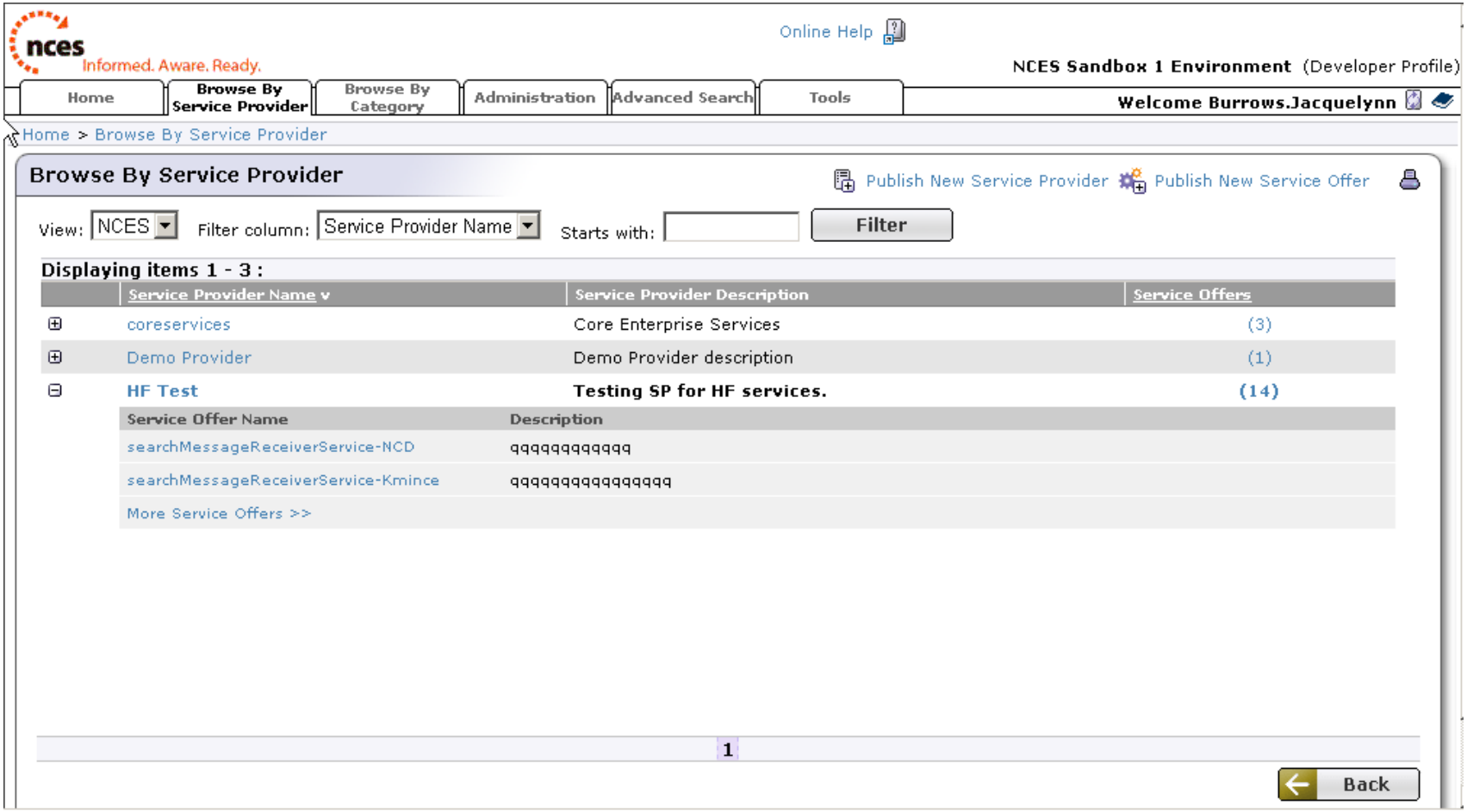
This section describes detailed instructions for browsing through the Service Offers in the NCES Service Registry, organized by the Service Provider under which they are published.

Browse By Service Provider – Main Page



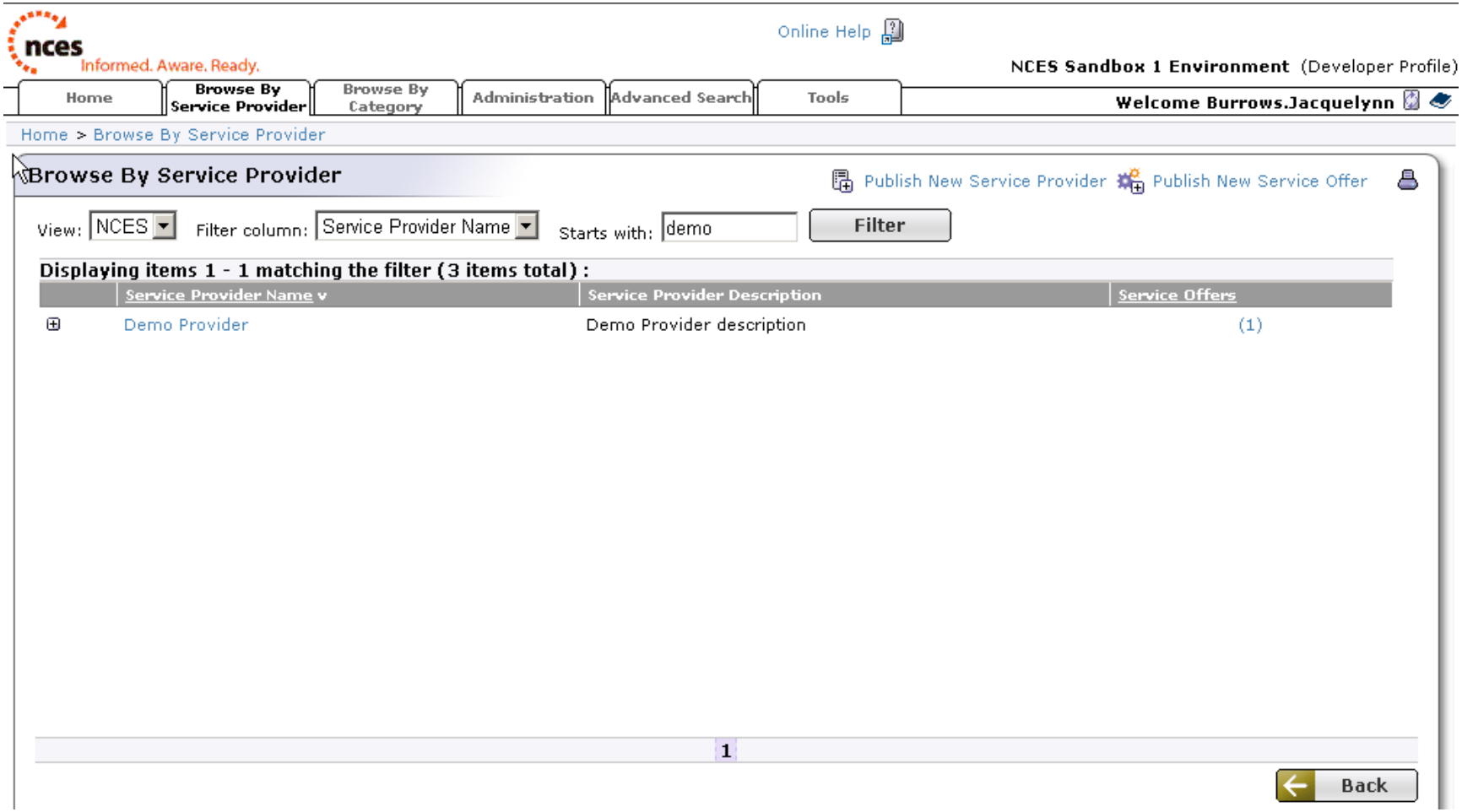
- **Click the Browse By Service Provider tab.**
- **To browse the service offers published under a service provider, click the plus icon next to the service provider.**

Browse By Service Provider – Expand Service Provider Node



- **If there are more than two service offers offered by the service provider, only two service offers are shown.**
- **To view the complete list of the service offers, click the More Service Offers link.**

Browse By Service Provider – Search Filter

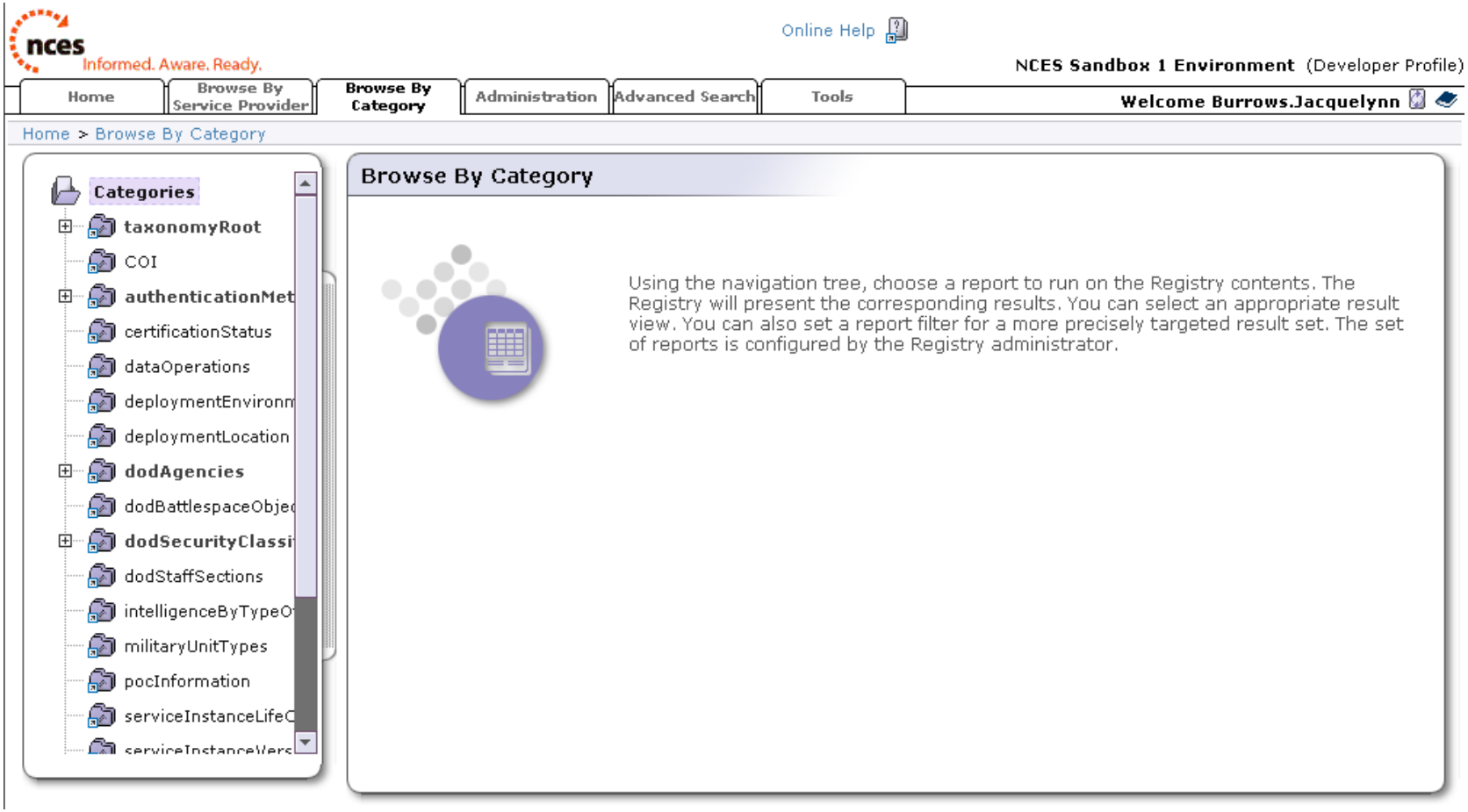


- **To filter the service providers by name, choose Service Provider Name from the Filter Column drop down menu, type a string in the Starts with field and click the Filter button.**

Browse By Category Tab

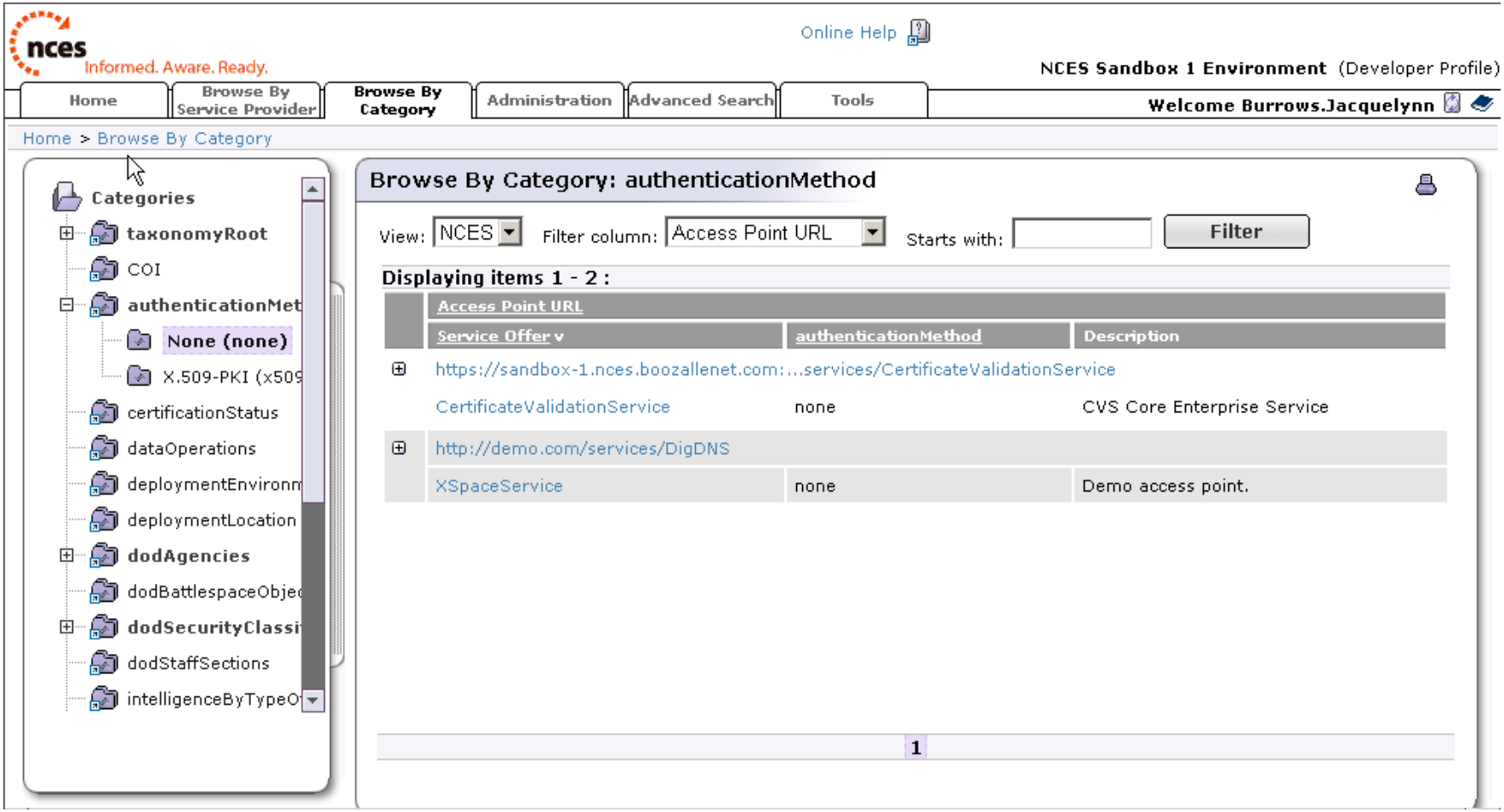
This section describes detailed instructions for browsing through the Service Offers in the NCES Service Registry, organized by their Categorization.

Browse By Category – Main Page



- **Click the Browse By Category tab.**
- **To traverse through the category tree, click the plus icon next to the categories. Only those categories that are used in the categorization of service providers, service offers, access points, interface specifications and binding specifications are displayed.**

Browse By Category – Search Filter



- **To filter the objects that are returned, select a value from the Filter Column drop down menu, type a string in the Starts with field, and click the Filter button.**

Administration Tab

This section describes detailed instructions for using the management functionality that allows the user to Search, Create, Edit, and Delete the following entities in the NCES Service Registry:

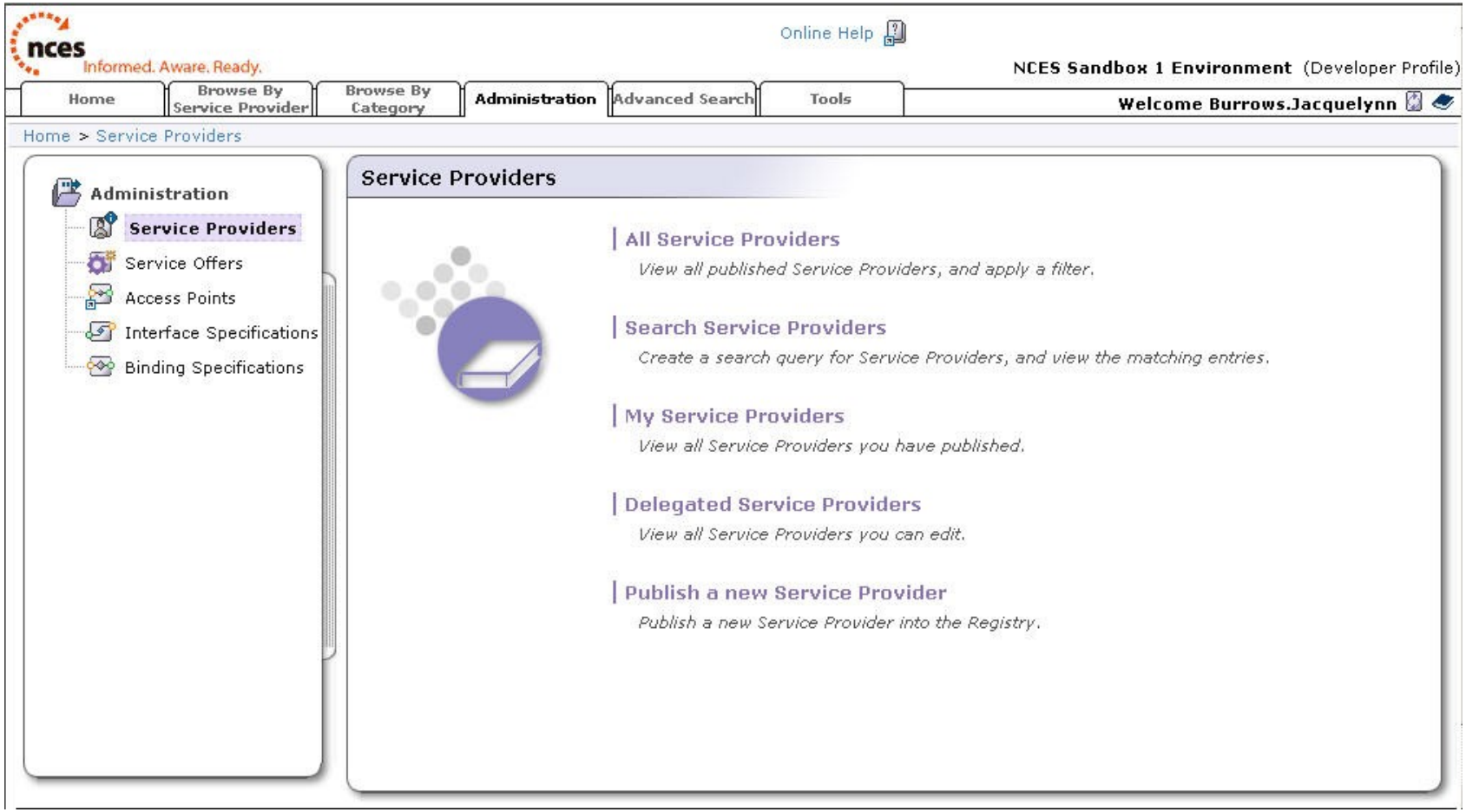
- **Service Providers**
- **Service Offers**
- **Access Points**

Note: All fields for entering information have a maximum 255 character limit.

Publish a Service Provider

This section describes detailed instructions for using the Publish a New Service Provider functionality.

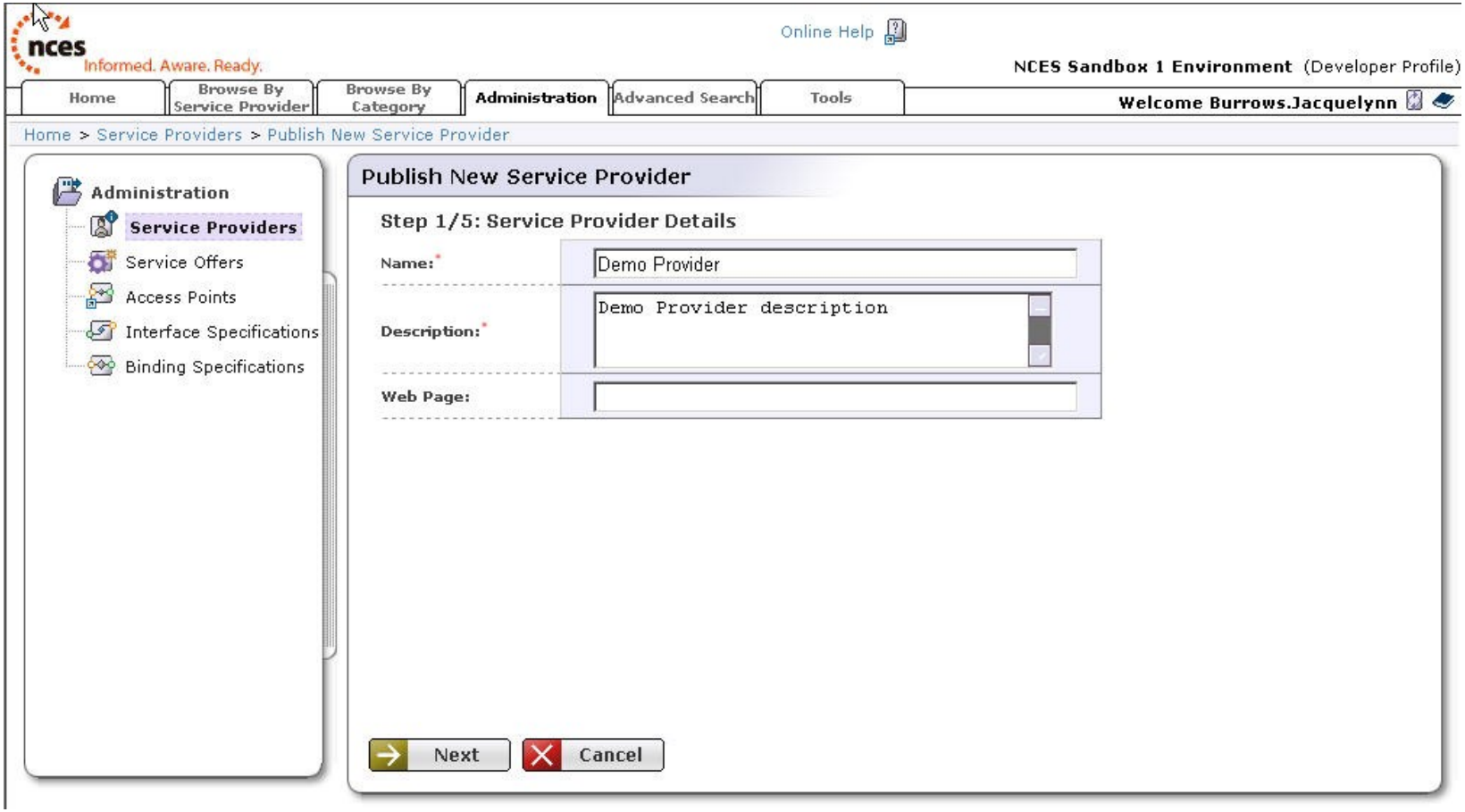
Publish a New Service Provider – Main Page



- **In the Administration tab, click the Service Providers link in the left pane and then click the Publish a new Service Provider link in the right pane.**

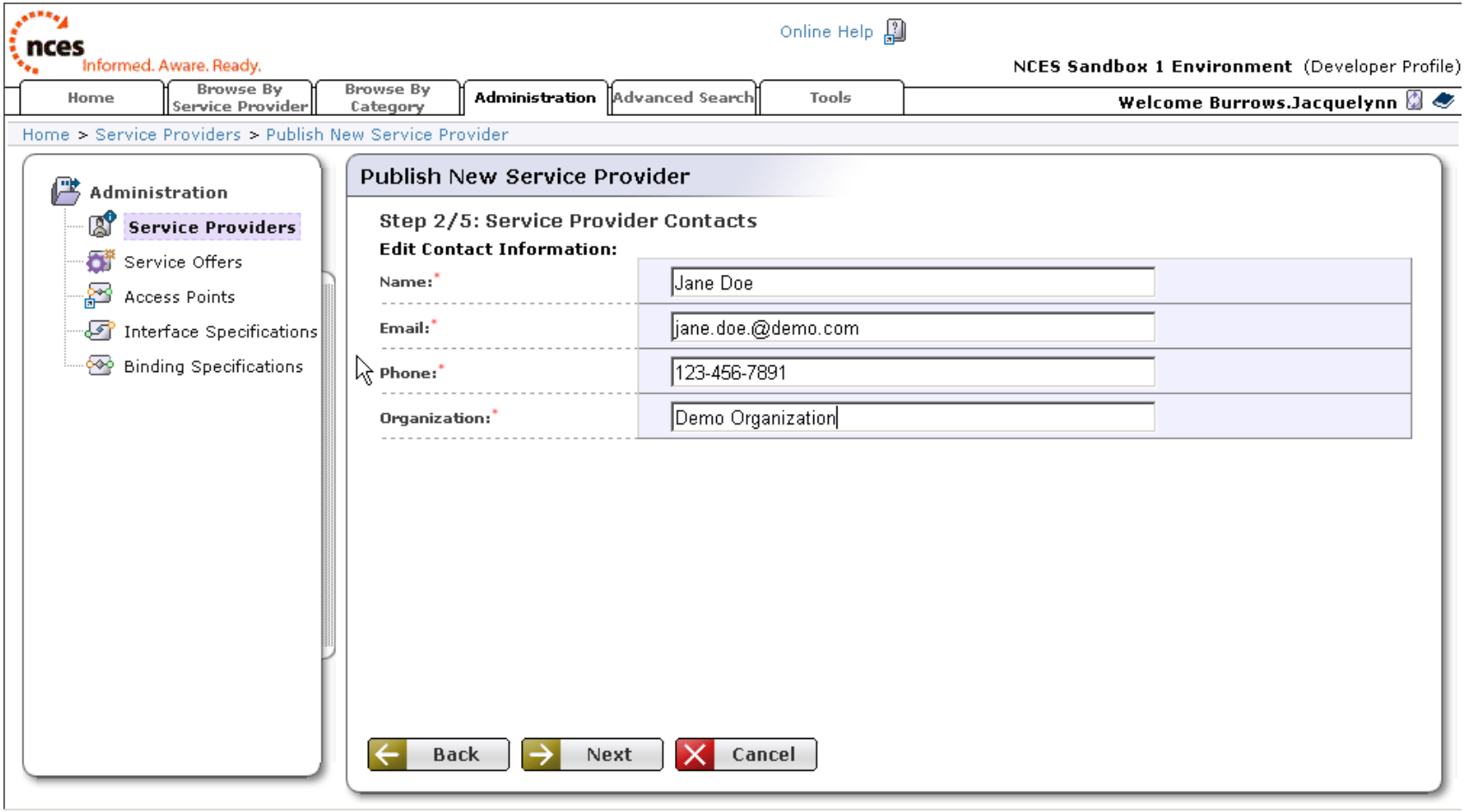
Note: Users may publish a new service provider ONLY if granted permission previously by a Service Provider administrator.

Publish a New Service Provider – Step One



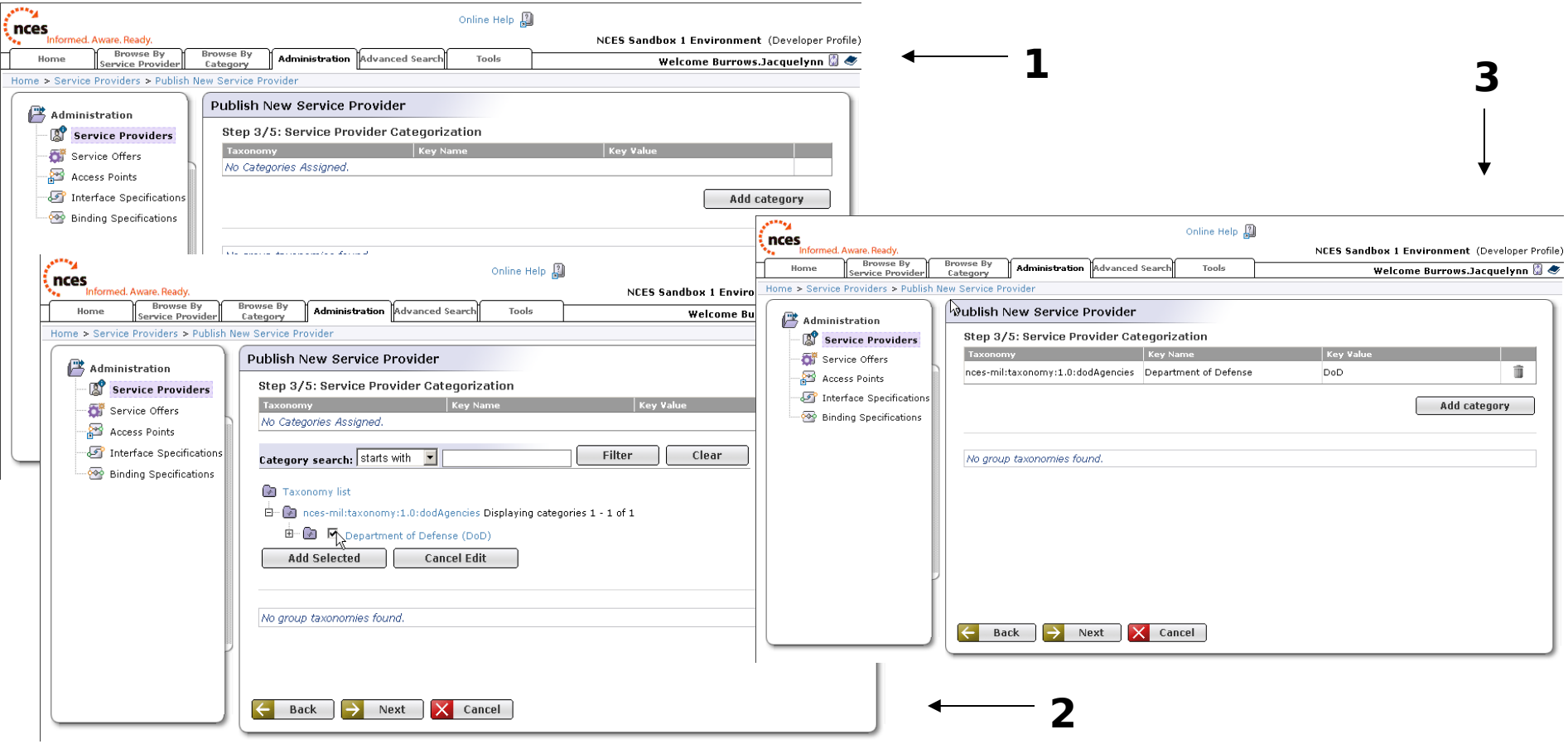
- **Enter service provider name, service provider description, and service provider home page Uniform Resource Locator (URL) (maximum character length of 255 for each field).**
- **Both the Name and Description fields are mandatory and MUST be provided. The Web Page field is optional.**

Publish a New Service Provider – Step Two



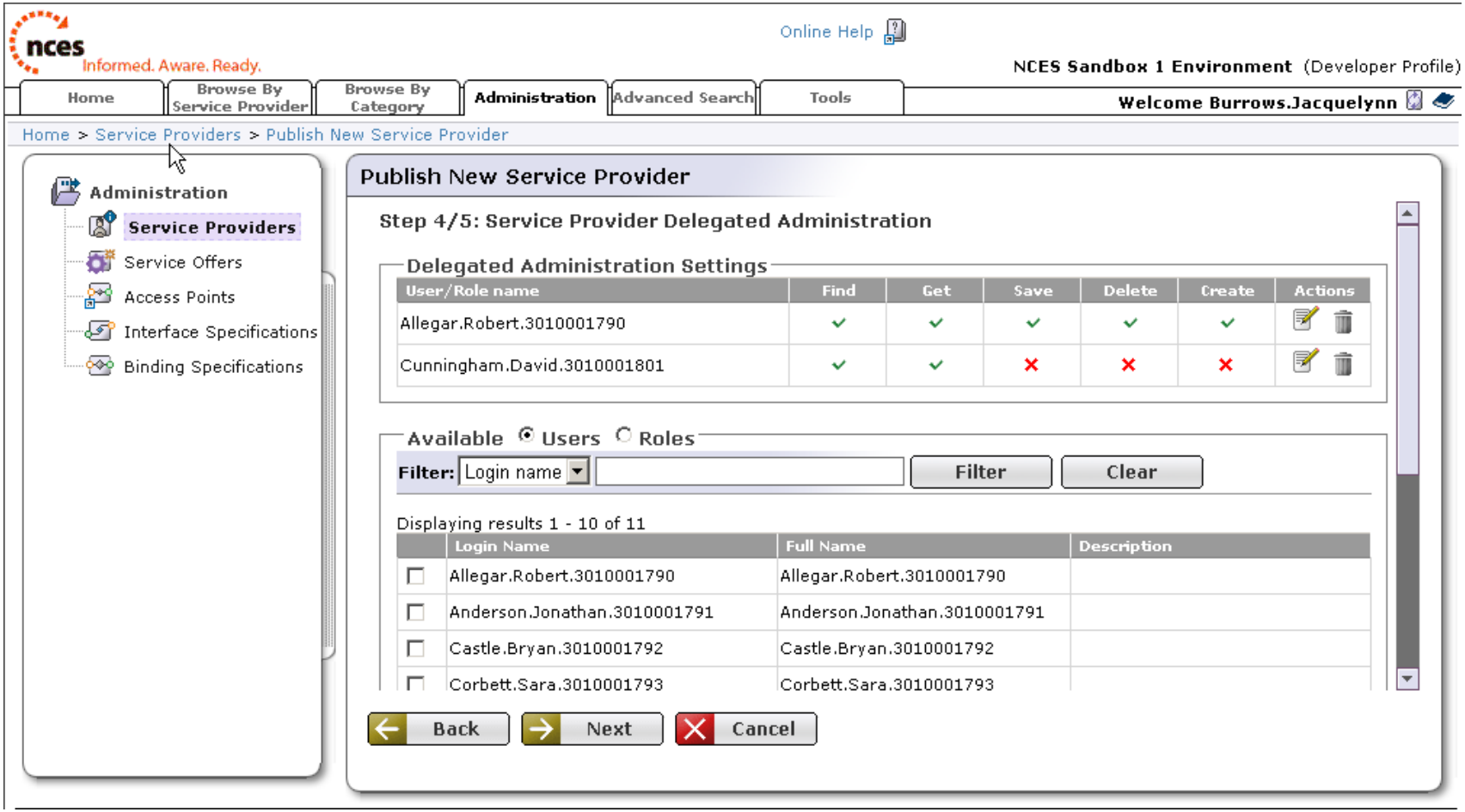
- **Enter contact information for the service provider. All fields are mandatory (maximum character length of 255 for each field)**

Publish a New Service Provider – Step Three



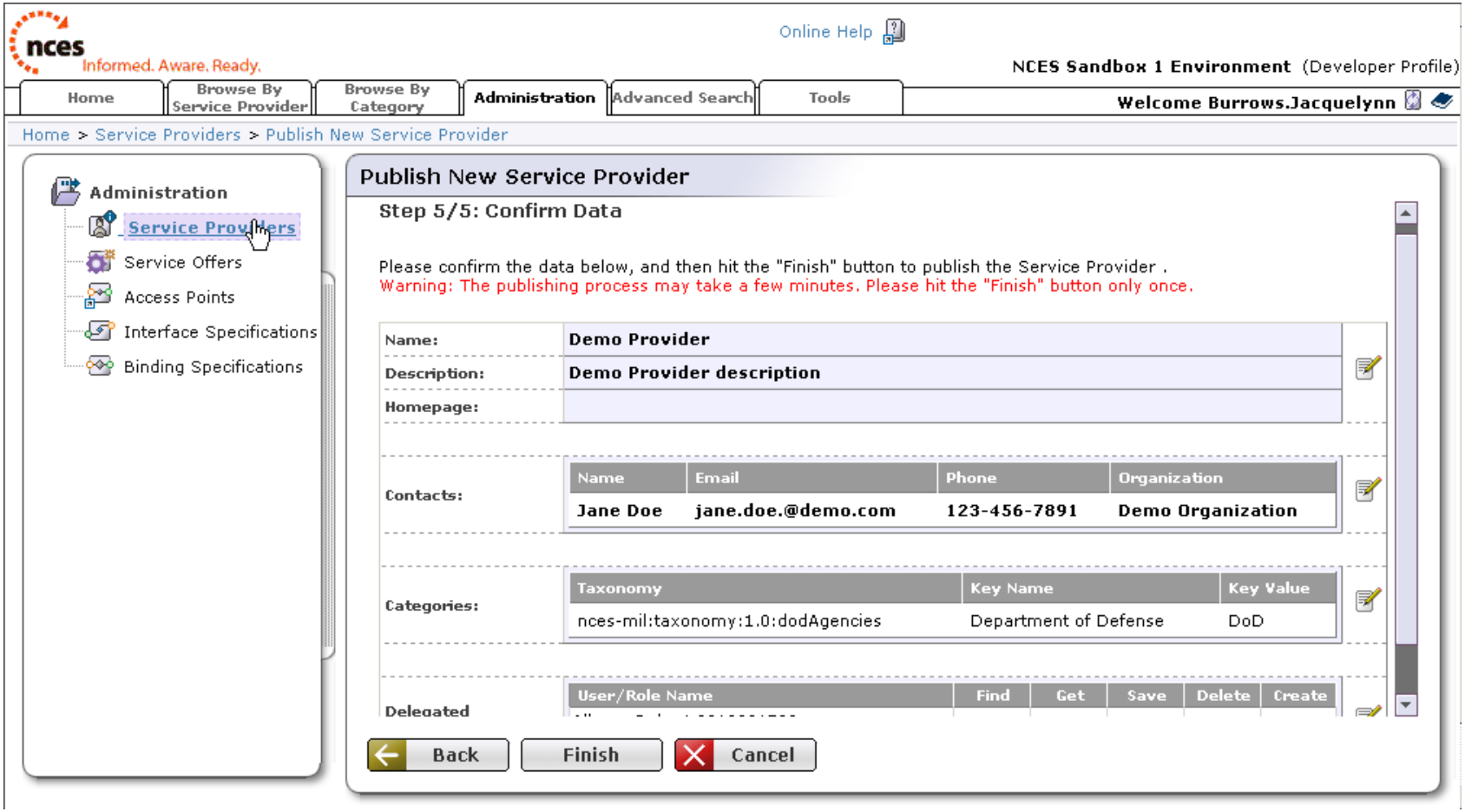
- **Add categories to the service provider using available taxonomies.**
- **To add categories to the service provider, following the instructions described in the Categorization Component section**

Publish a New Service Provider – Step Four



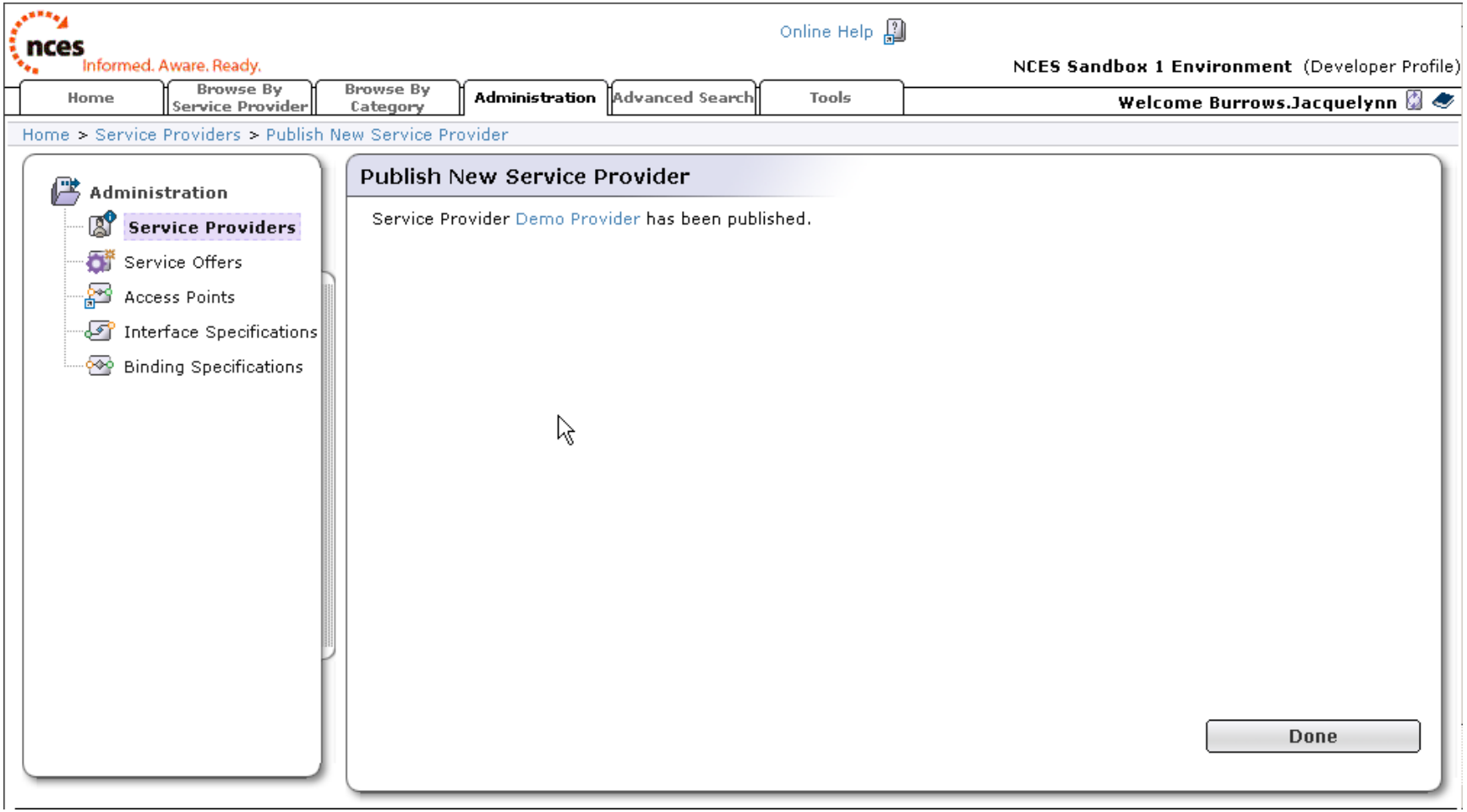
- **Set up the delegated administration for the service provider.**
- **To set up service provider delegated administration, follow the instructions described in the Delegated Administration Component section.**

Publish a New Service Provider – Step Five



- **Confirm the information about the service provider before completing the editing process. If any change is desired, click the corresponding edit icon to go to the detailed view and update the information.**

Publish a New Service Provider – Confirmation

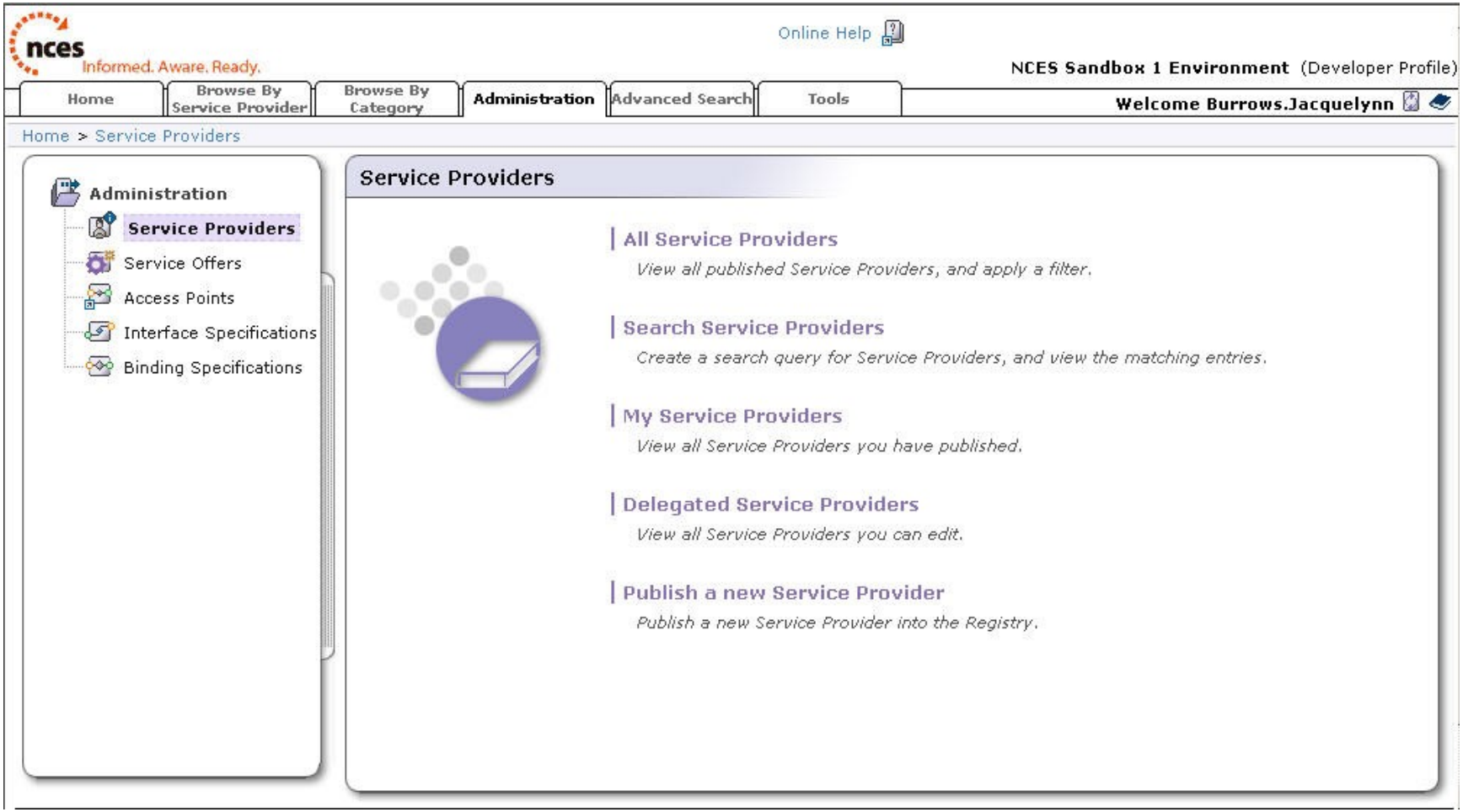


- **This page indicates that the service provider information has been published in the service registry.**

Edit a Service Provider

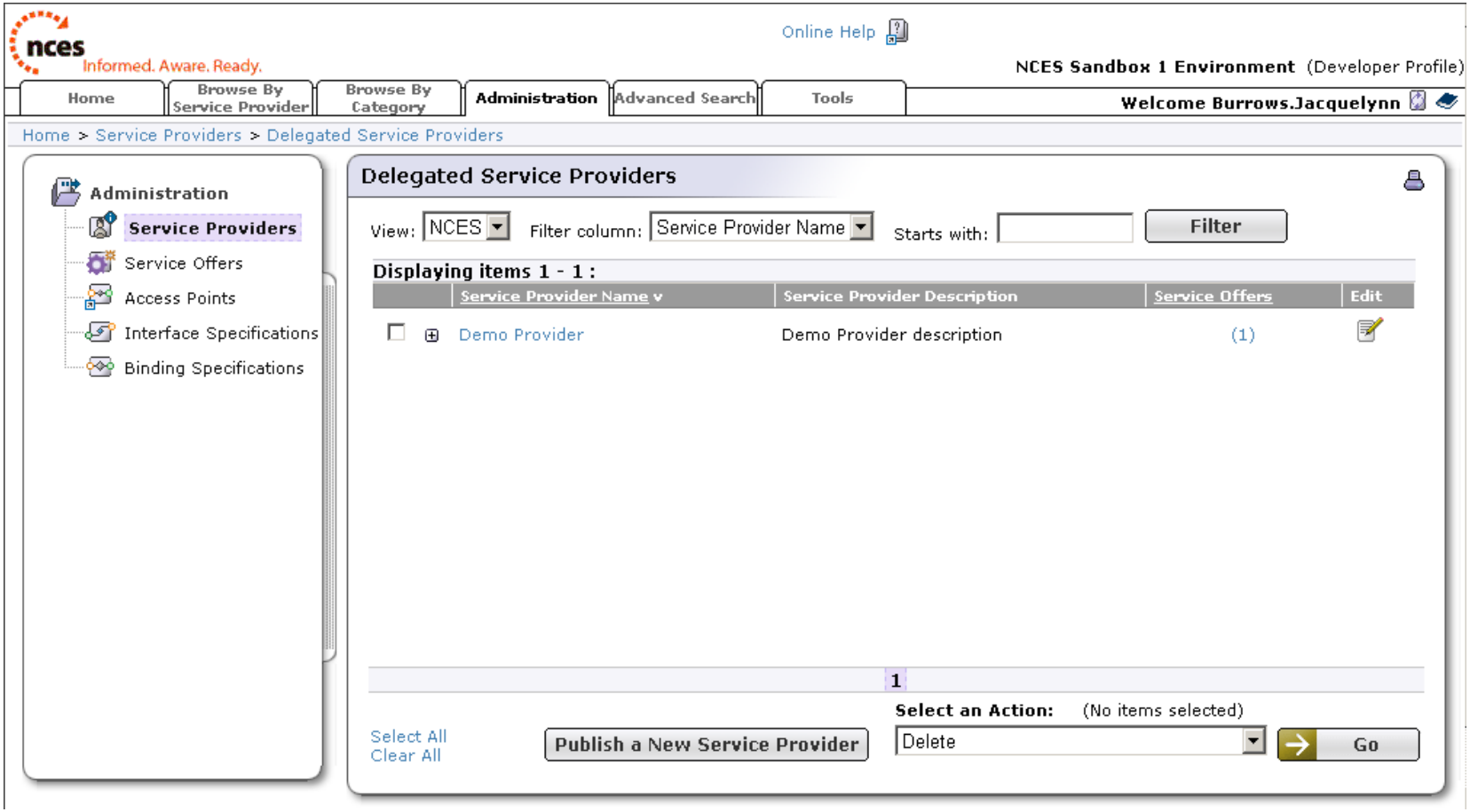
This section describes detailed instructions for using the Edit a Service Provider functionality.

Edit a Service Provider – Service Provider View



- **In the Administration tab, click the Service Providers link in the left pane and then click the Delegated Service Providers link in the right pane.**

Edit a Service Provider – Main Page

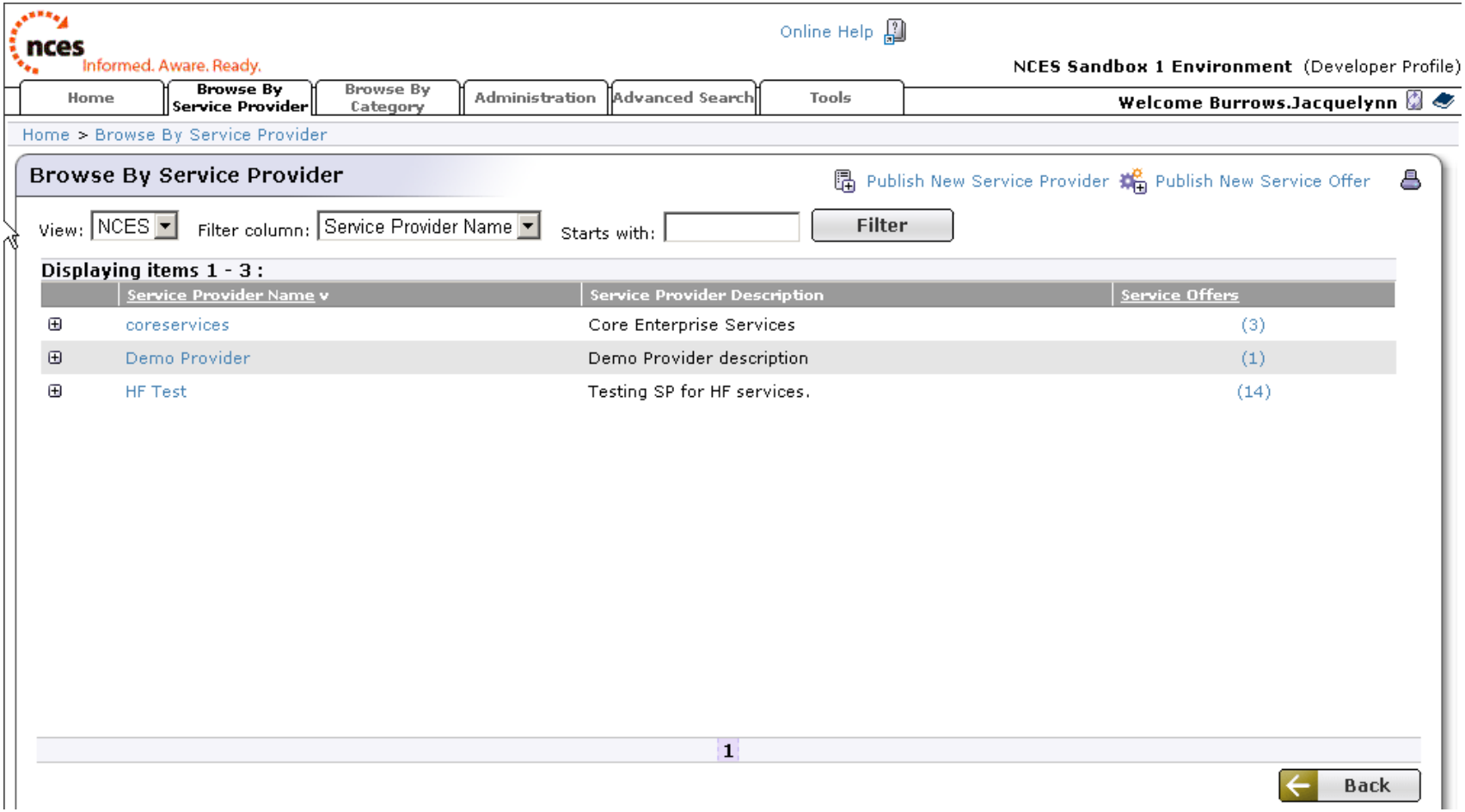


- **To edit a Service Provider, click on the Edit icon on right side of the page next to the service provider you wish to edit.**
- **Steps 1 – 5 of the Editing process match that of the Publish process. Refer to steps 1 – 5 of the Publishing a Service Provider section for further details.**

View a Service Provider

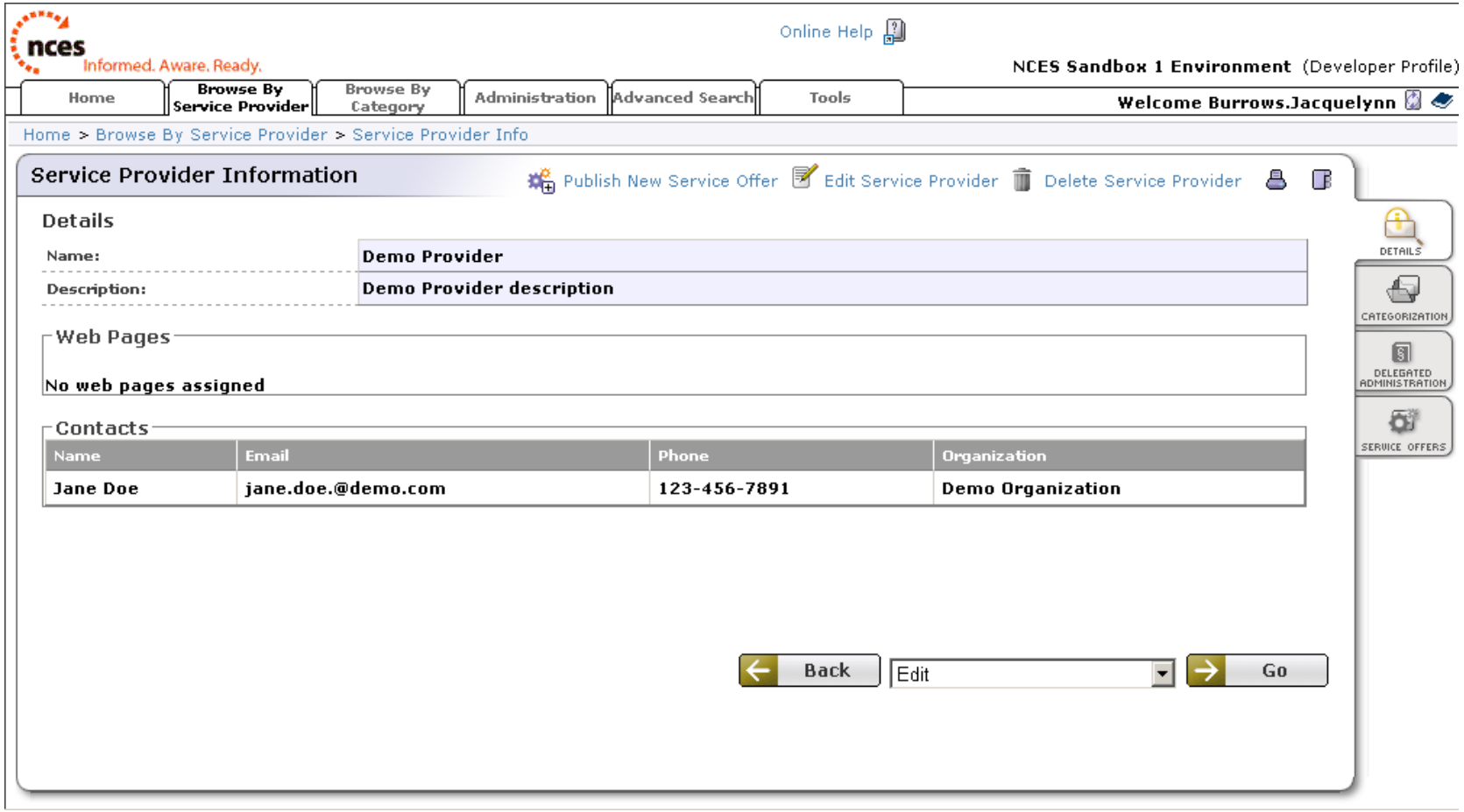
This section describes detailed instructions for using the View a Service Provider functionality.

View a Service Provider – Main Page



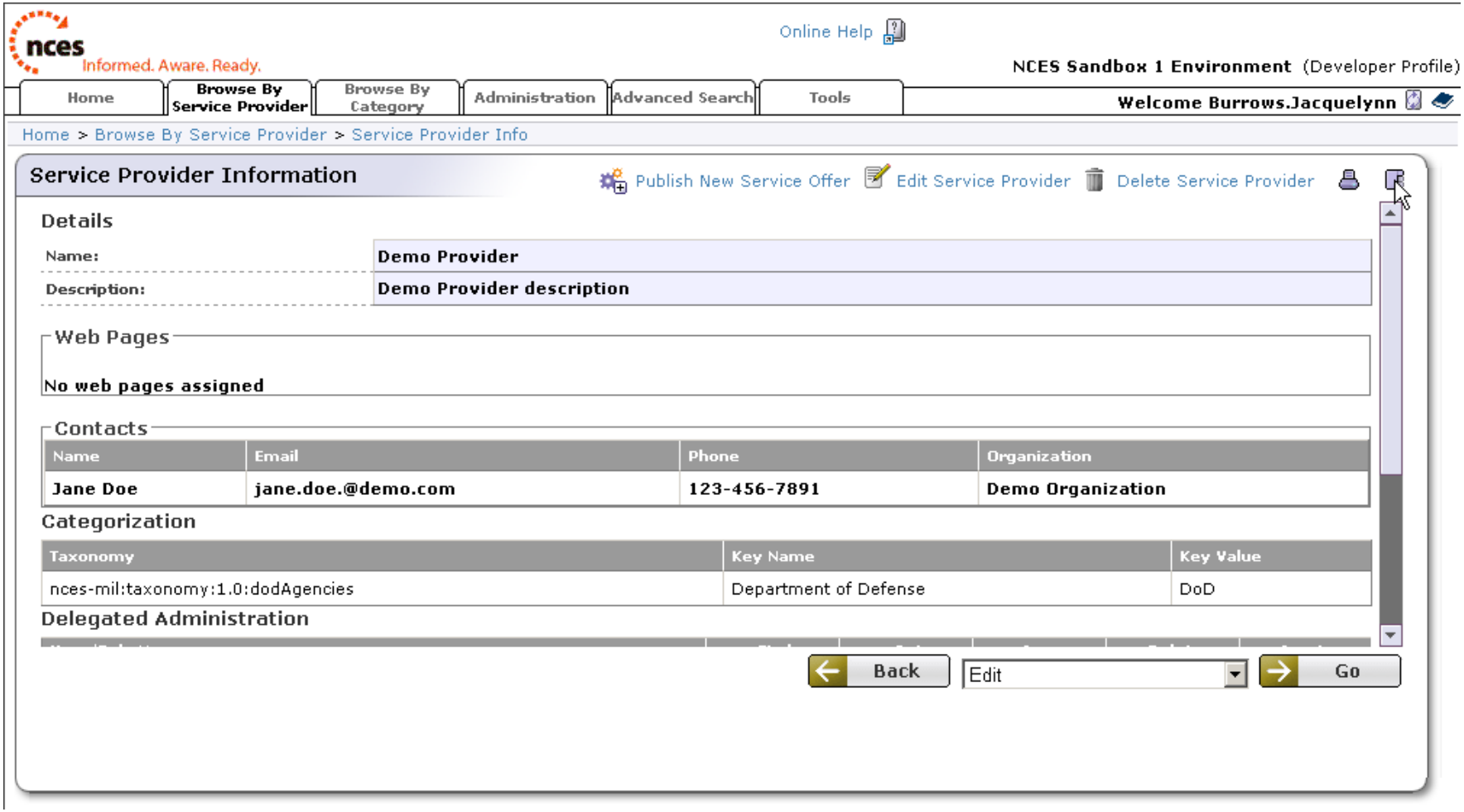
- **To view the detail information of a service provider, click the service provider link from the Browse By Provider tab or from a service offer detail view.**

View a Service Provider – Tabbed View



- **The screen above shows the Service Provider Details tab, and service provider name, service provider description, and service provider contact are displayed. To view other tabs, click the corresponding tab on the right hand side.**

View a Service Provider – Summary View

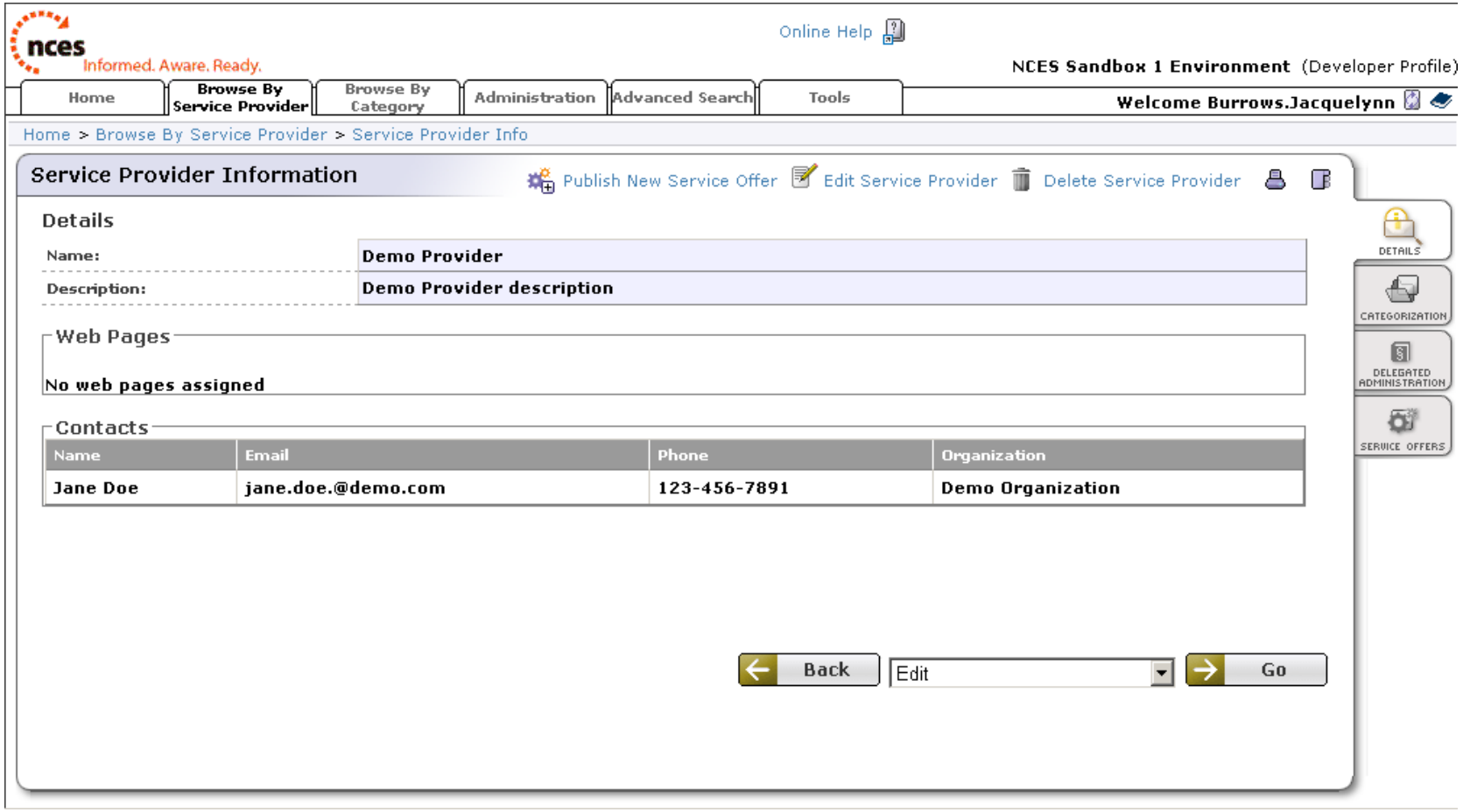


- **To view the service provider detail information without tabs, click the Show/Hide Tab icon on the top right side of the screen.**

Delete a Service Provider

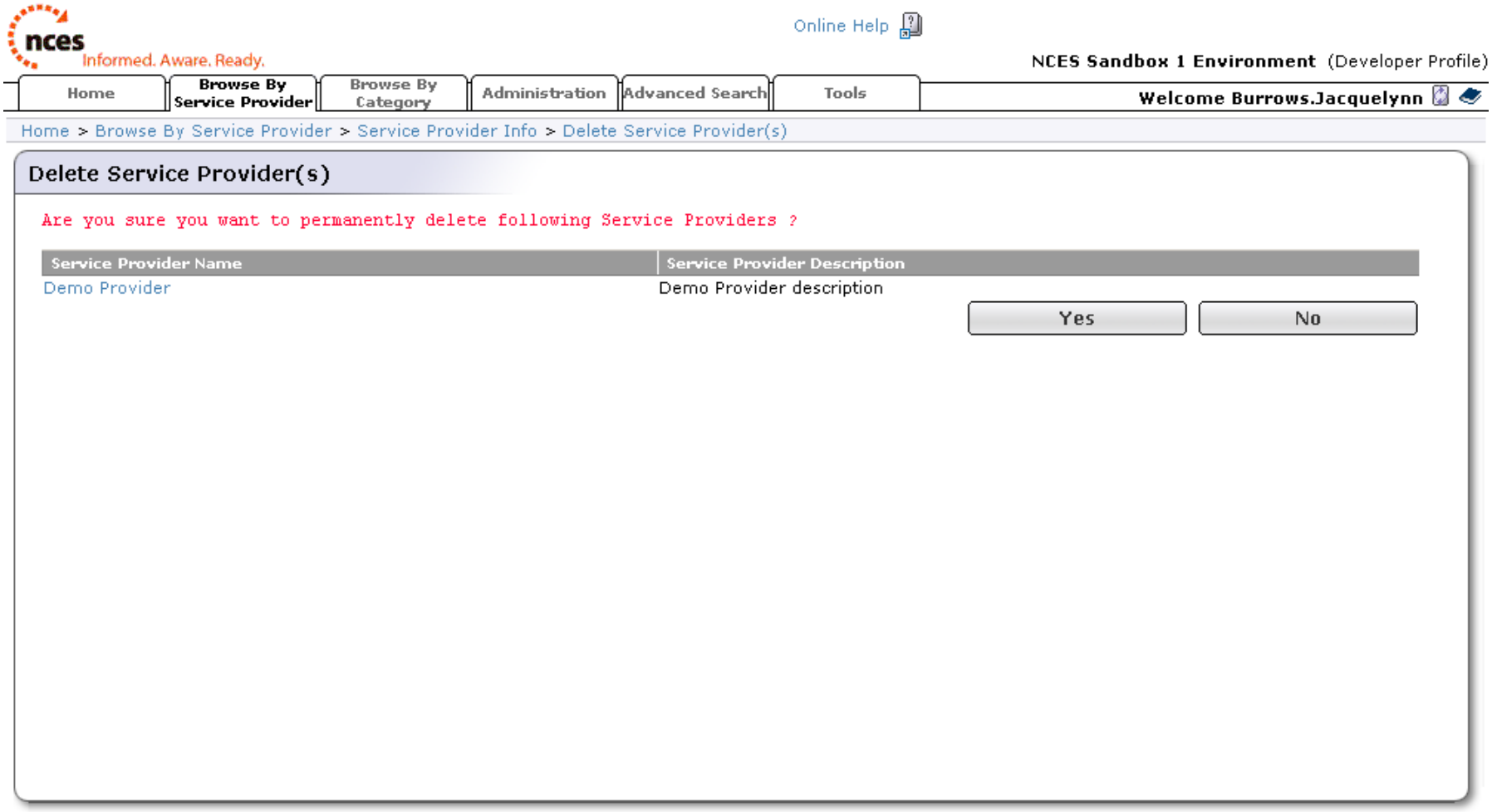
This section describes detailed instructions for using the Delete a Service Provider functionality.

Delete a Service Provider



- **To delete a service provider, on a service provider view, click the Delete Service Provider link on the top right side or choose Delete from the drop down menu on the bottom right corner and click the Go button.**

Delete a Service Provider - Confirmation

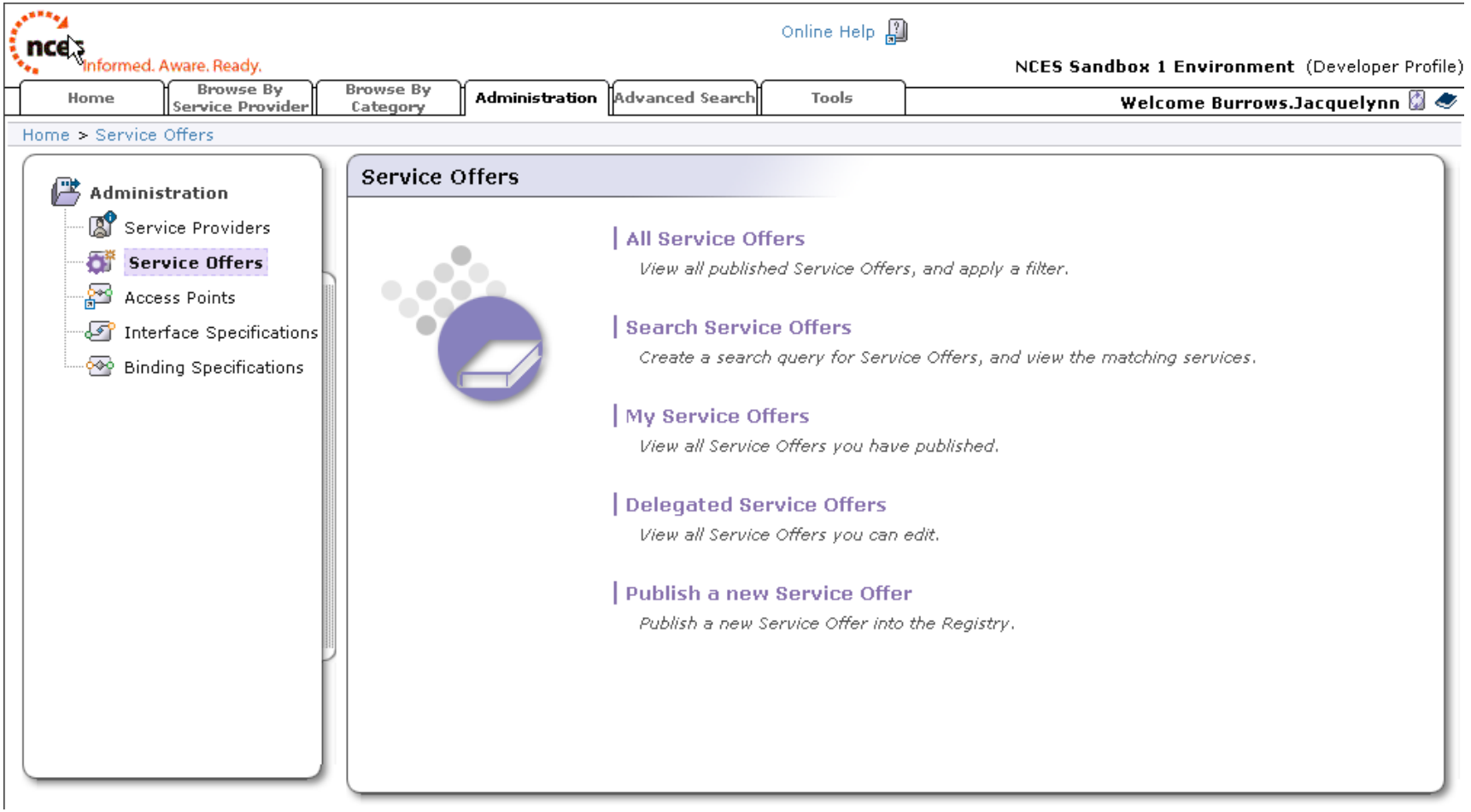


- **The screen above will display after choosing to delete a service provider. To continue, click Yes. To cancel, click No.**

Publish a Service Offer

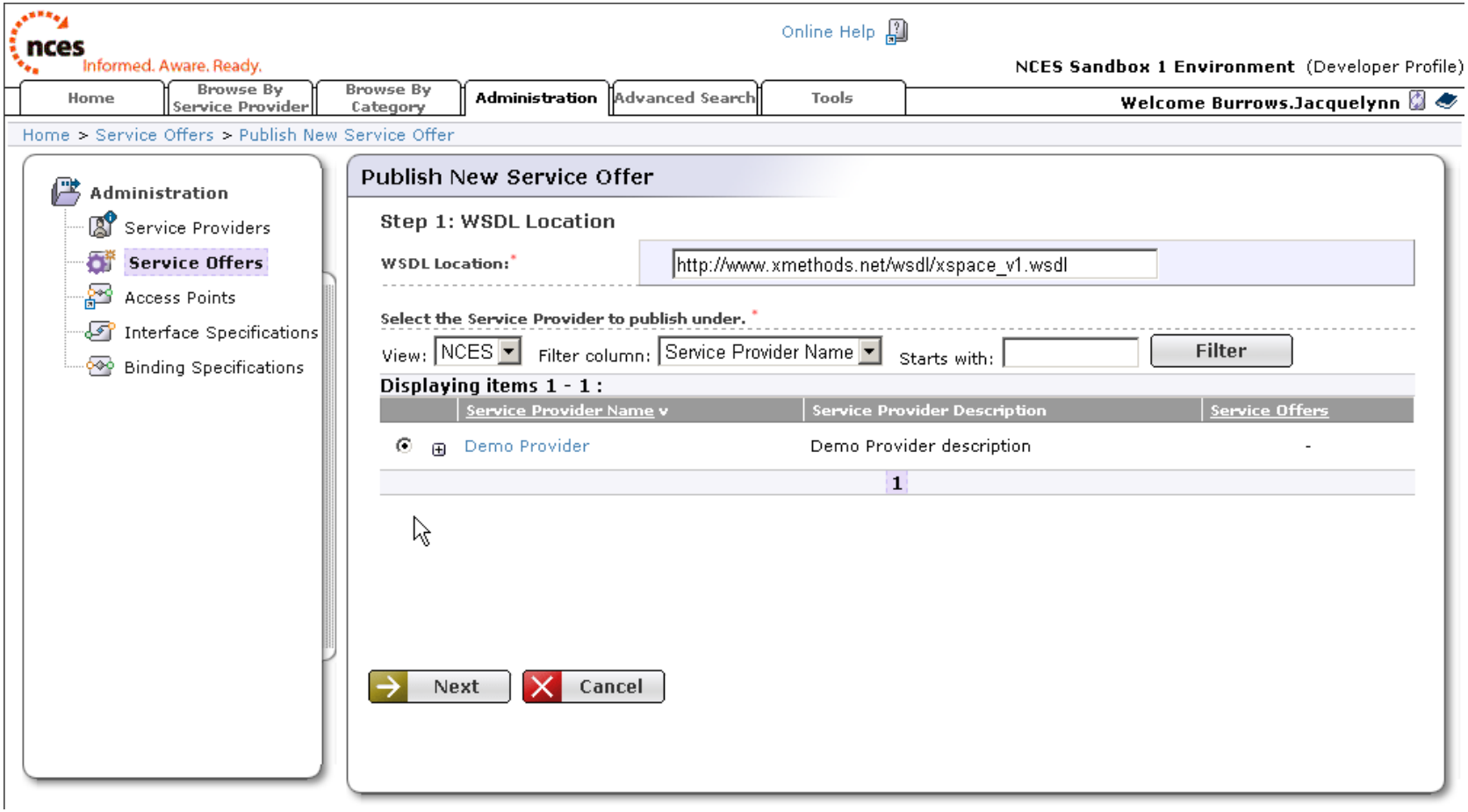
This section describes detailed instructions for using the Publish a New Service Offer functionality.

Publish a New Service Offer – Main Page



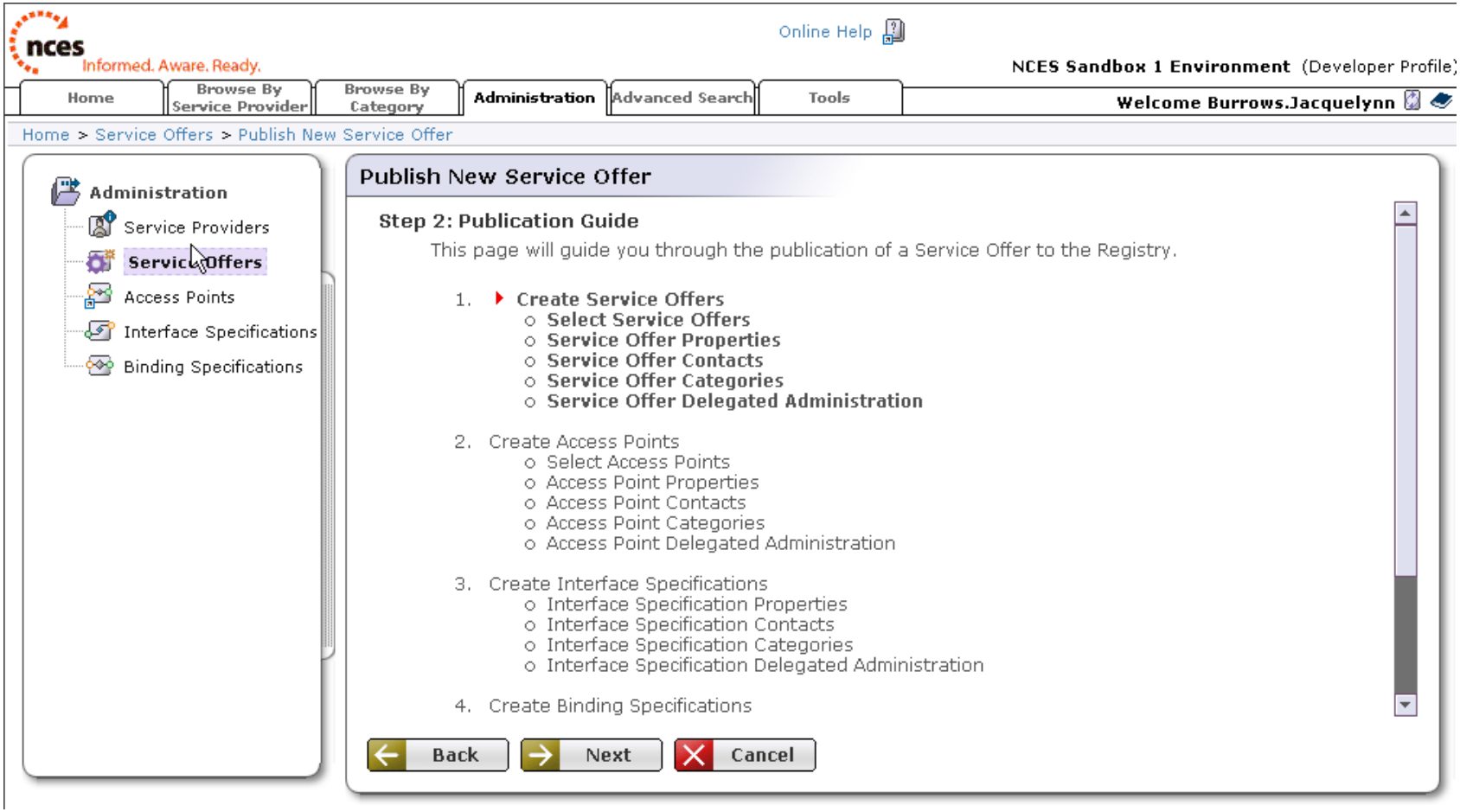
- **In the Administration tab, click the Service Offers link in the left pane and then click the Publish a new Service Offer link in the right pane.**

Publish a New Service Offer – Step One



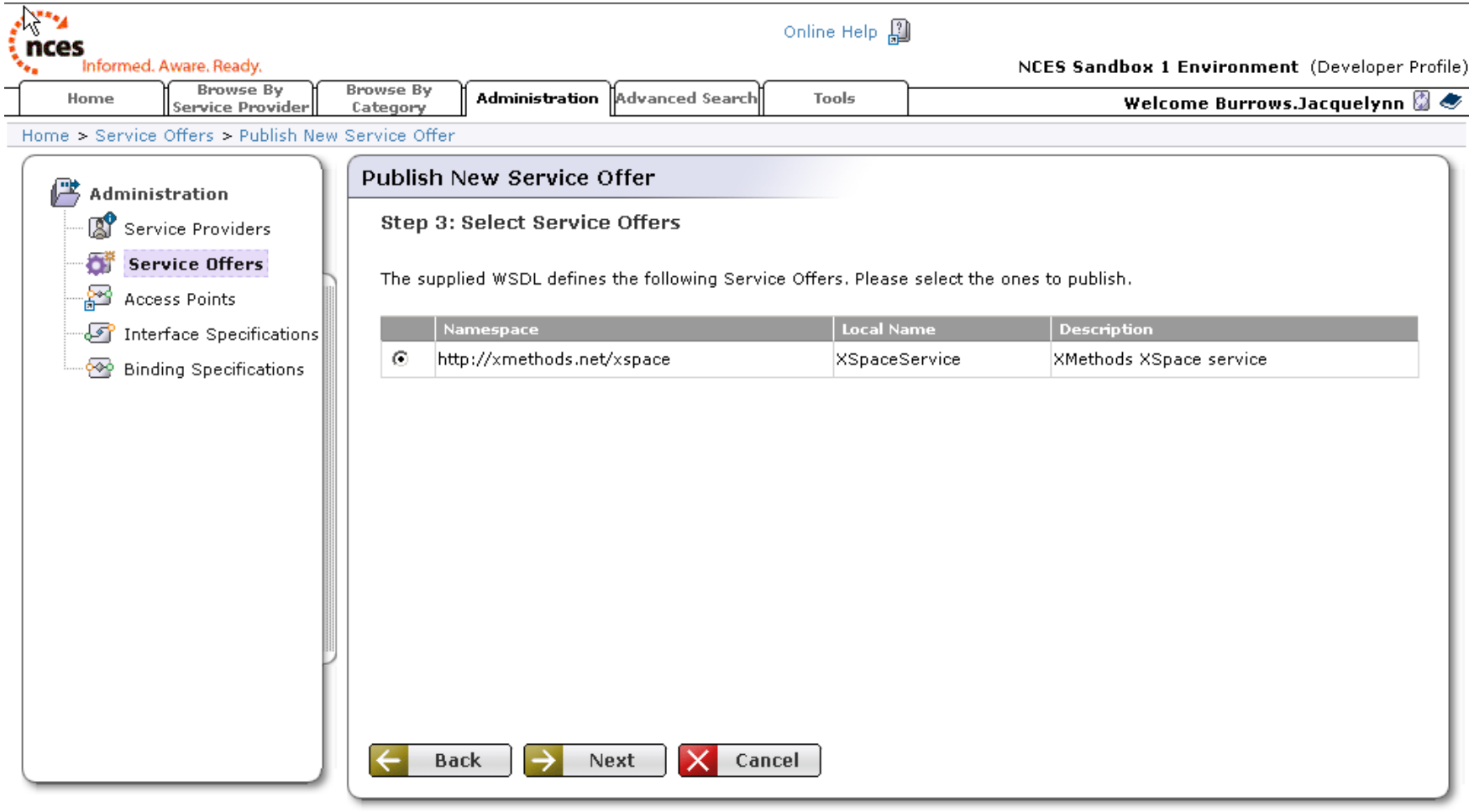
- **Choose a service provider the new service offer from a list of registered service providers and provide a concrete Web Service Definition Language (WSDL) document by pointing to a URL where the concrete WSDL document for the service offer is located (maximum character length of 255 for each field).**

Publish a New Service Offer – Step Two



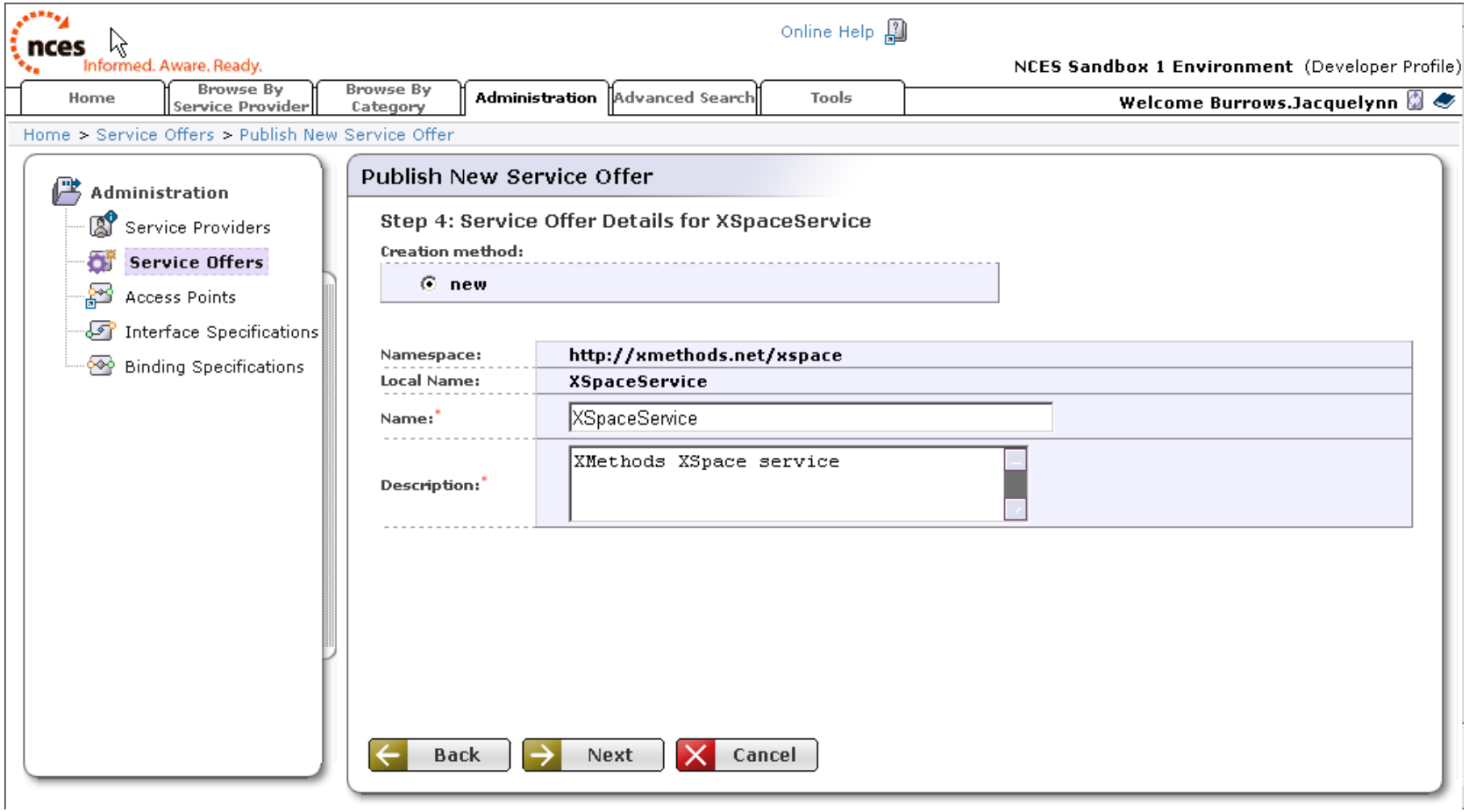
- **The service offer publication guide directs the user through the publication of a new service offer and indicates the progress of the publication process.**
- **To start the creation of service offers, click the Next**

Publish a New Service Offer – Step Three



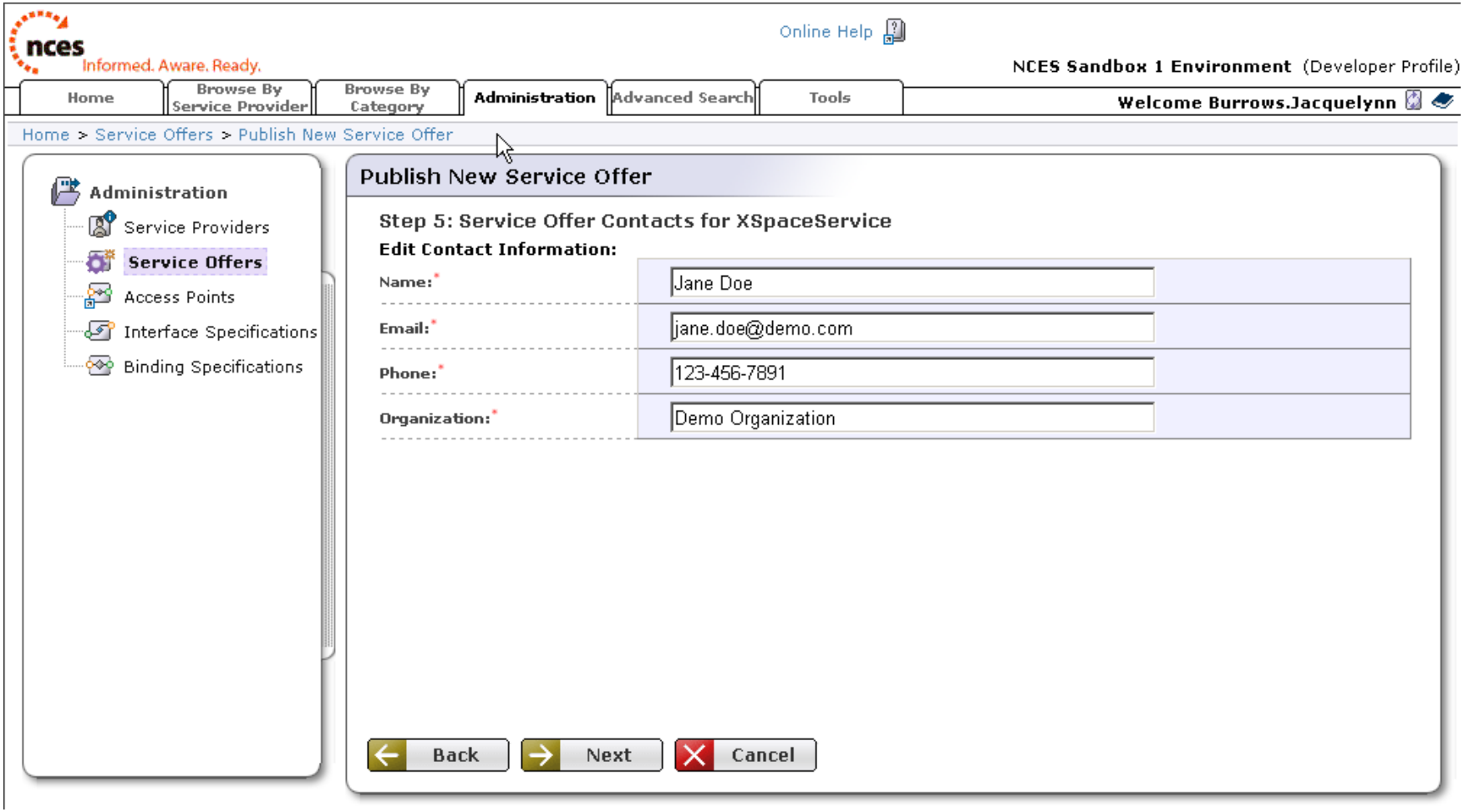
- **To select a service offer, click the radio button next to the service offer.**

Publish a New Service Offer – Step Four



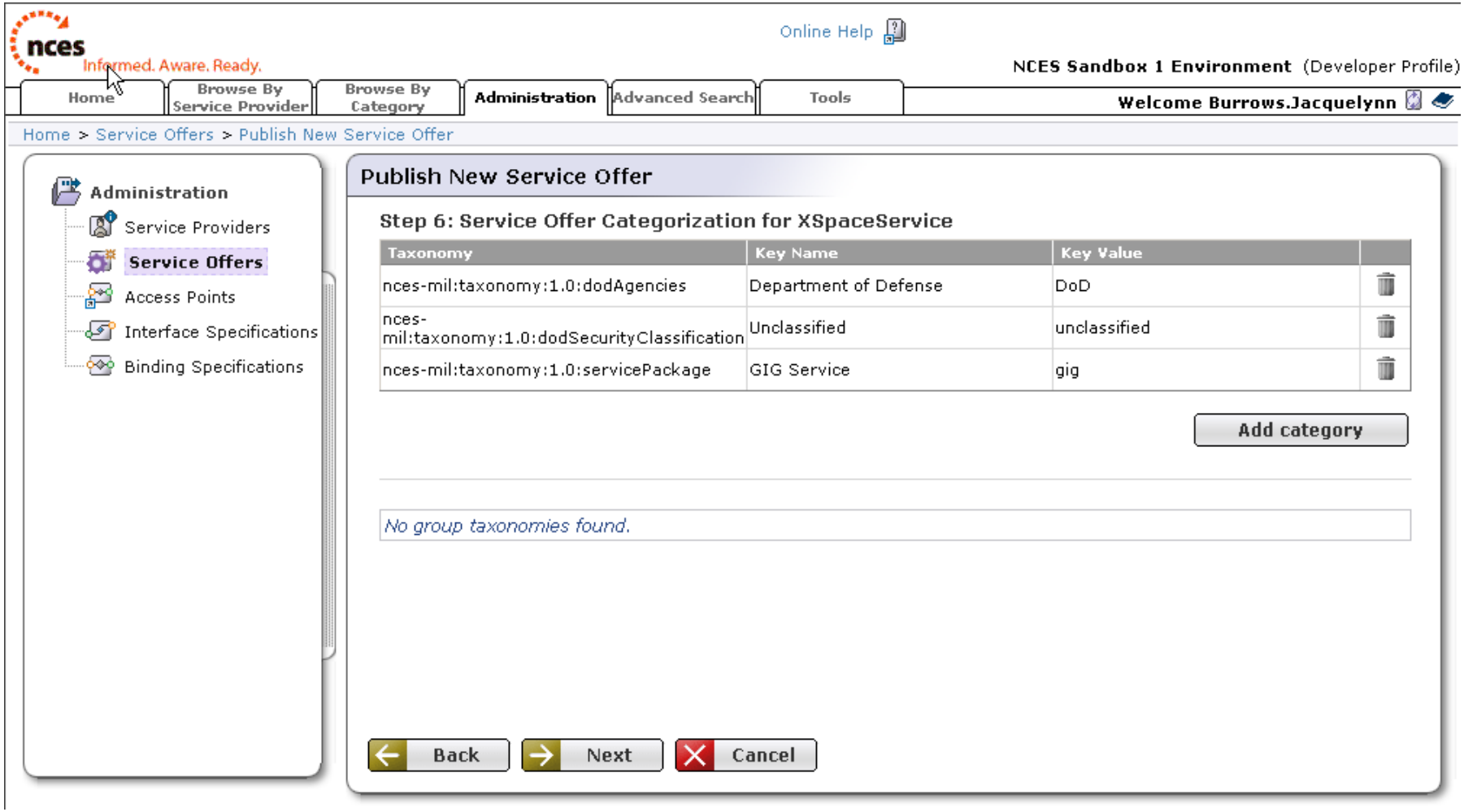
- **Enter basic information about the service offer: service offer namespace, service offer local name, service offer name, and service offer description (maximum character length of 255 for each field).**
  - **Note: Service offer Namespace and service offer Local Name values are obtained from the**

Publish a New Service Offer – Step Five



- **Enter the point of contact information for the service offer. All fields are mandatory (maximum character length of 255 for each field).**

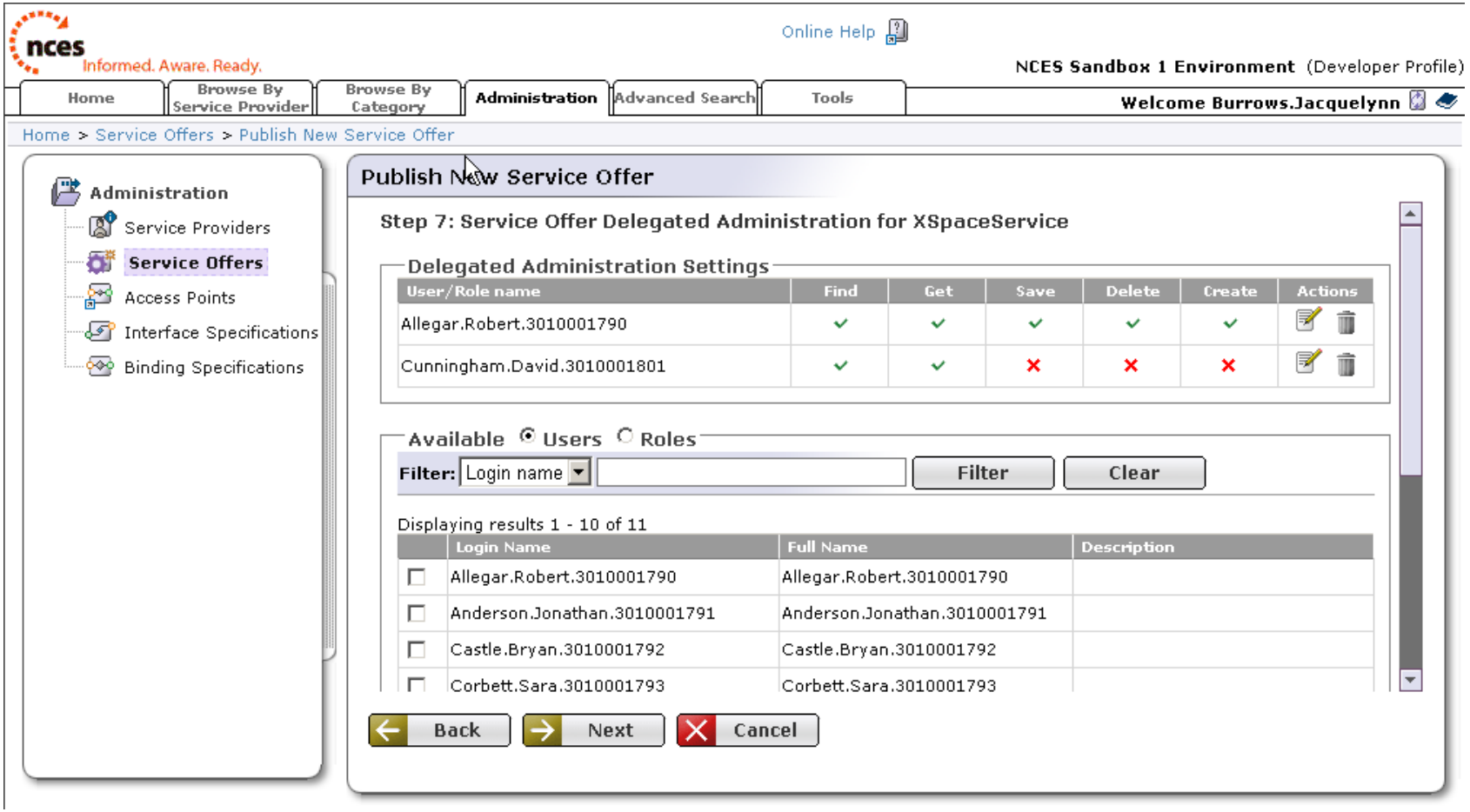
Publish a New Service Offer – Step Six



- **Add categories to the service offer using taxonomical information. This step is mandatory.**

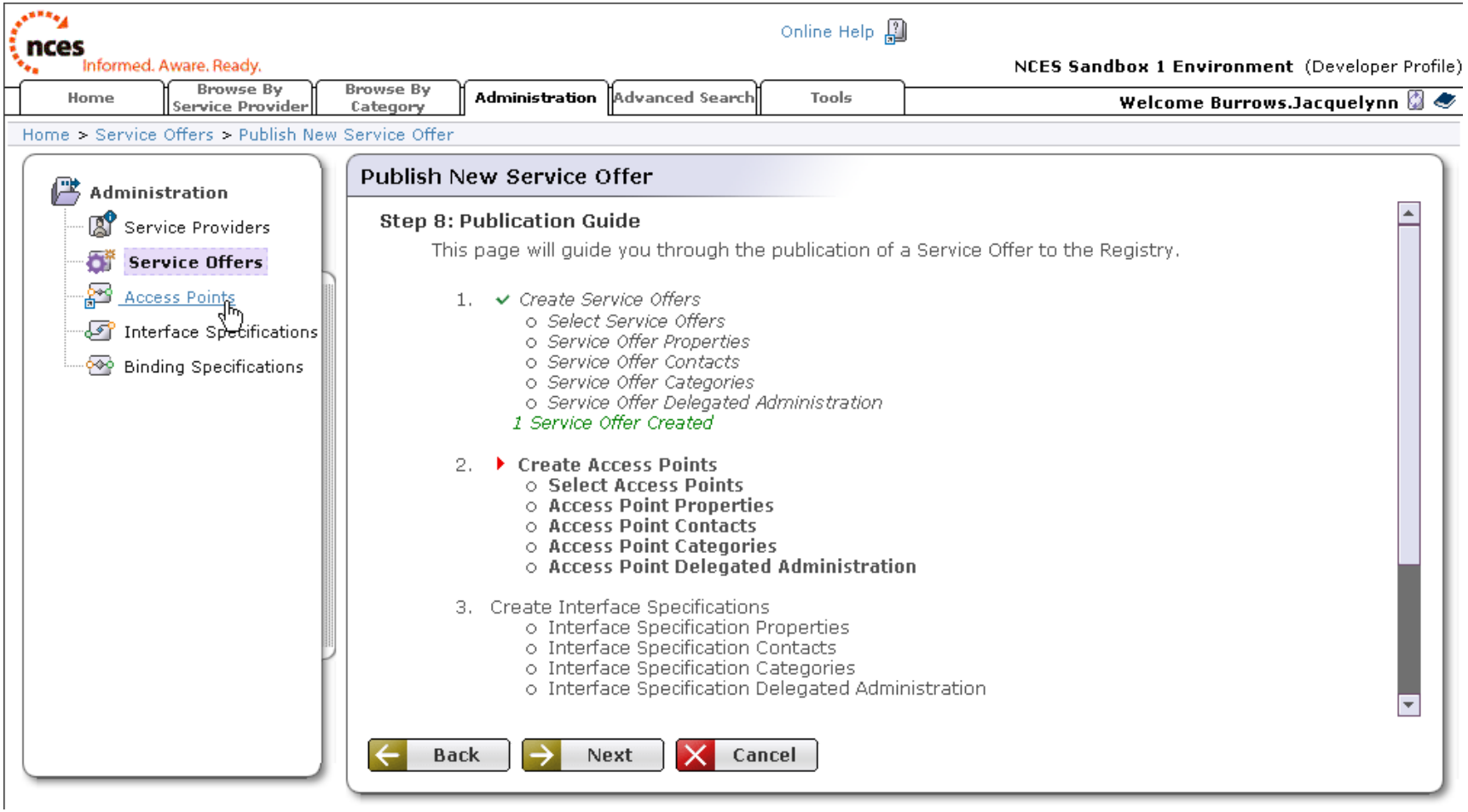
Note: categories have already been added in the screenshot above.

Publish a New Service Offer – Step Seven



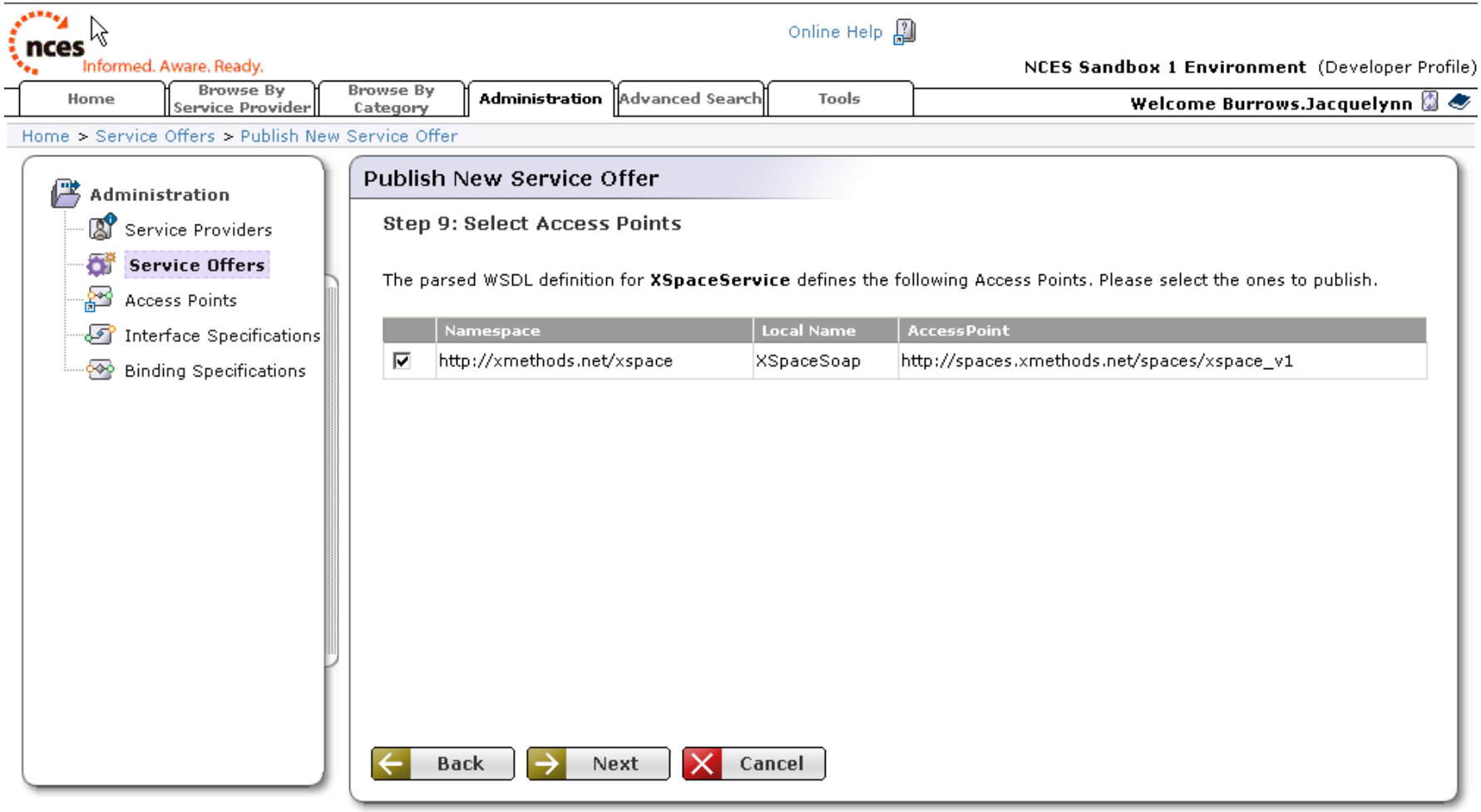
- **Set up the delegated administration for the service offer.**
- **To set up service provider delegated administration, follow the instructions described in the Delegated Administration Component section**

Publish a New Service Offer – Step Eight



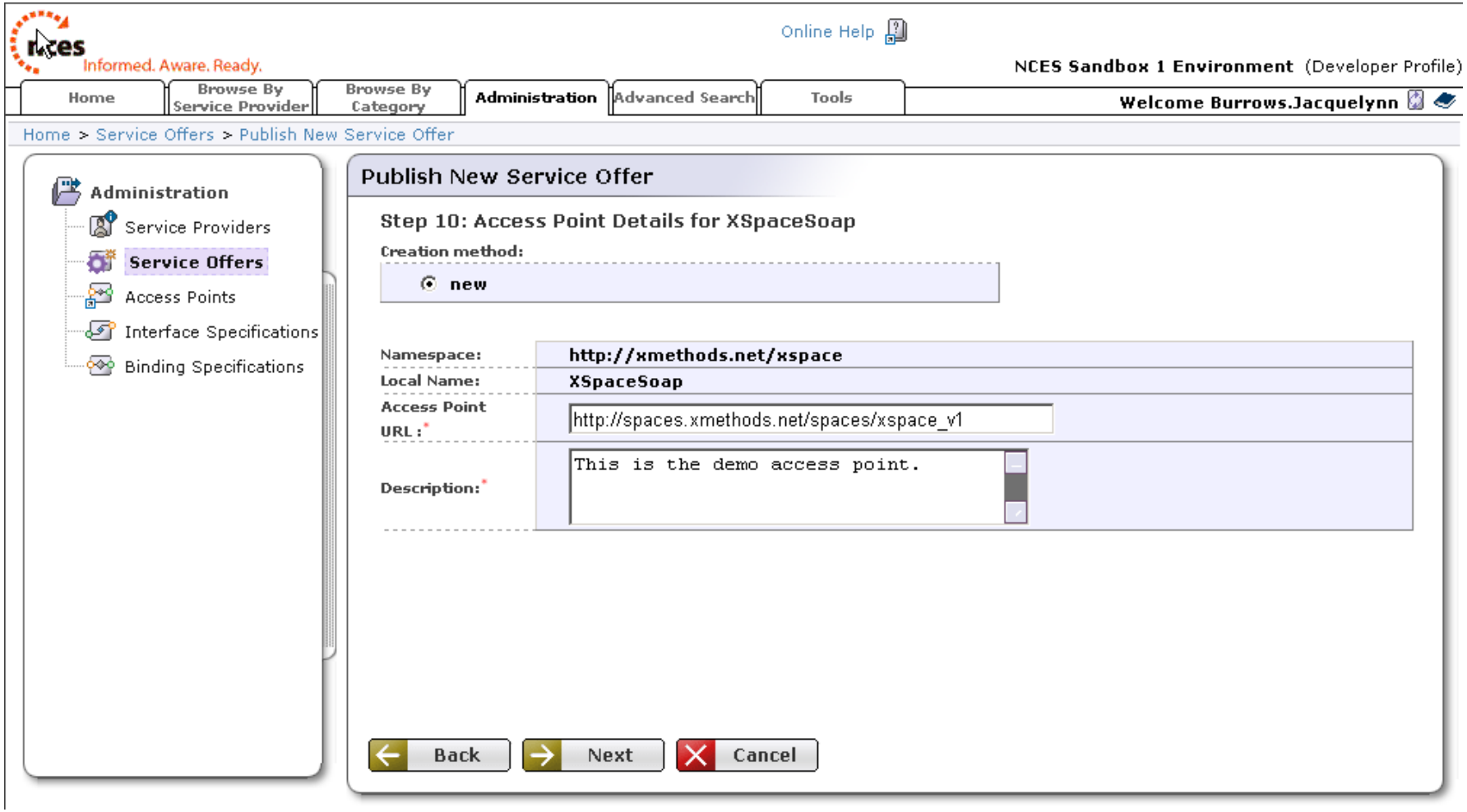
- **This step indicates that the service offer has been created successfully.**
- **To start the creation of access points click the Next button.**

Publish a New Service Offer – Step Nine



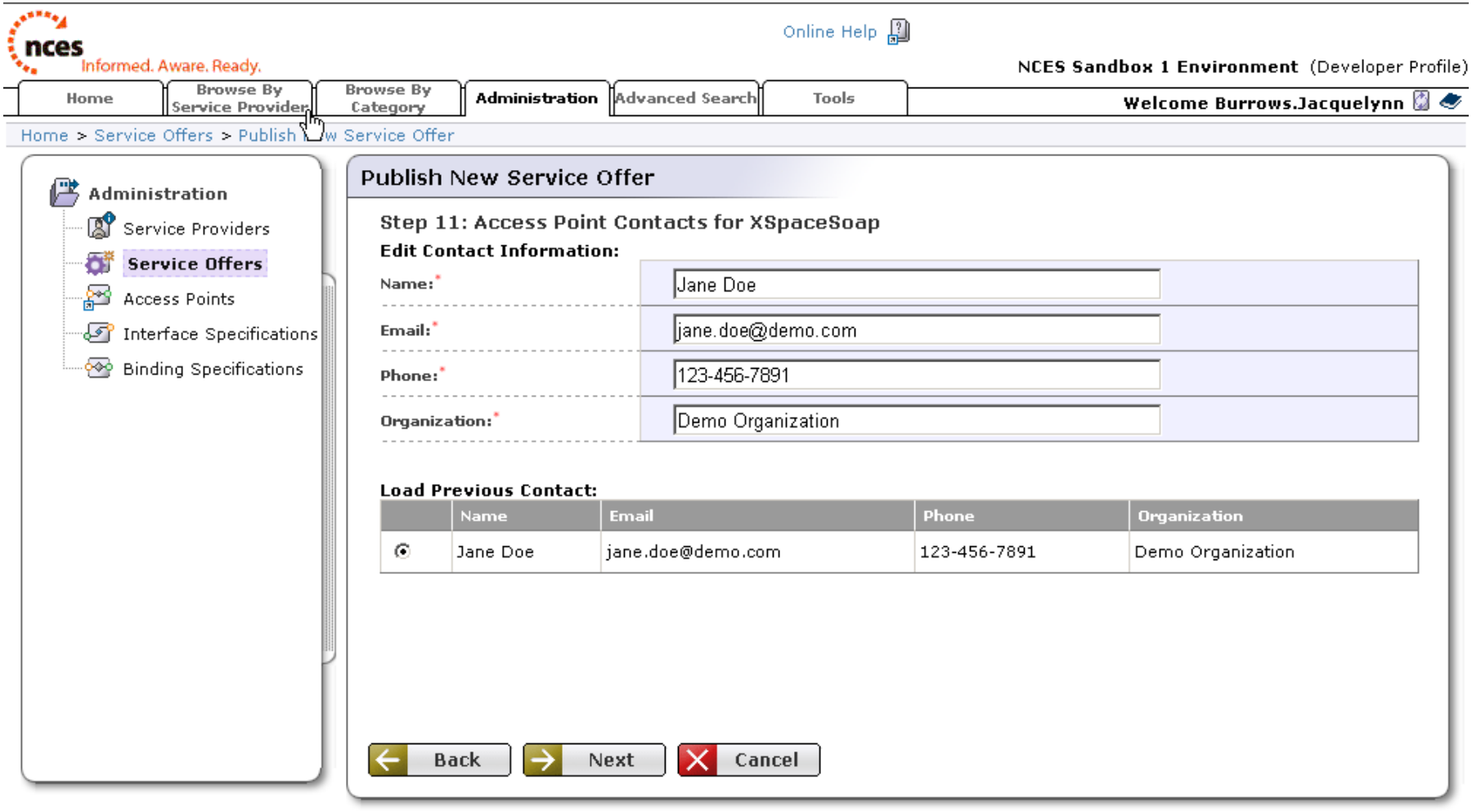
- **Select the access points defined in the WSDL for the current service offer.**

Publish a New Service Offer – Step Ten



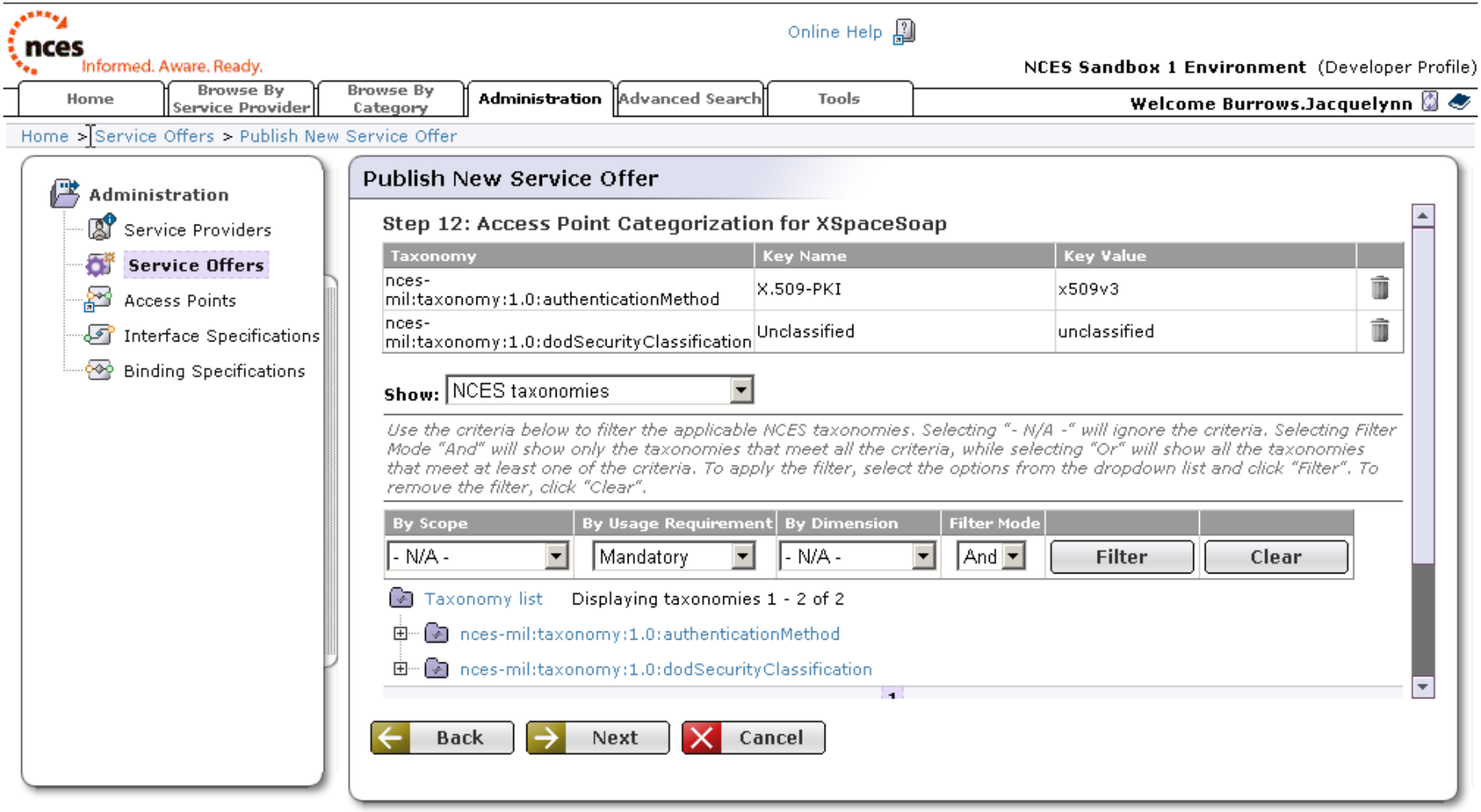
- **Enter basic information about the access point: access point namespace, access point local name, access point URL, and access point description (maximum character length of 255 for each field)**

Publish a New Service Offer – Step Eleven



- **Enter the point of contact information for the access point, or select the radio button next to a previous contact in the Load Previous Contact list. All fields are mandatory (maximum of 255 for each field)**

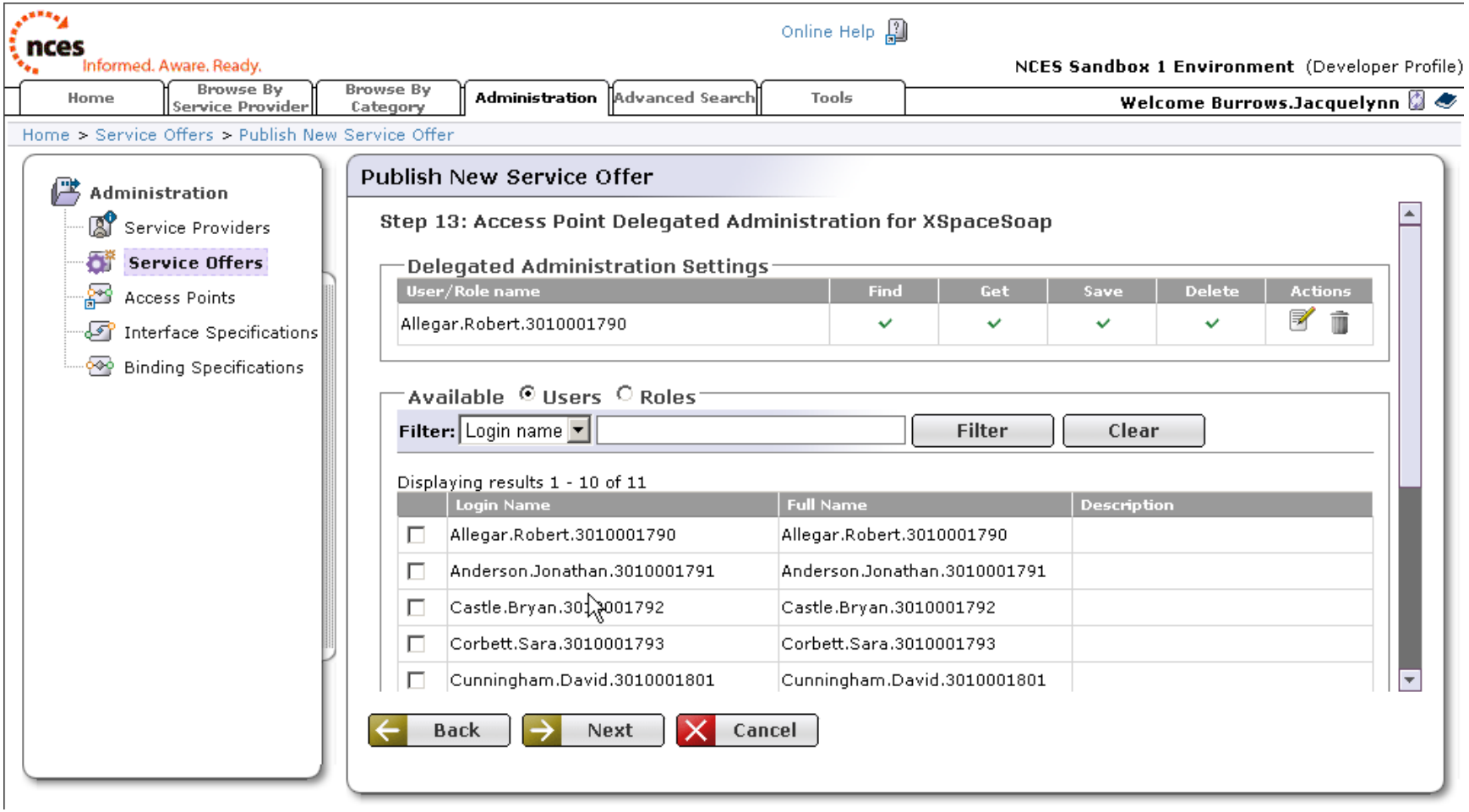
Publish a New Service Offer – Step Twelve



- **Add categories to the access point using available taxonomies. This step is mandatory.**

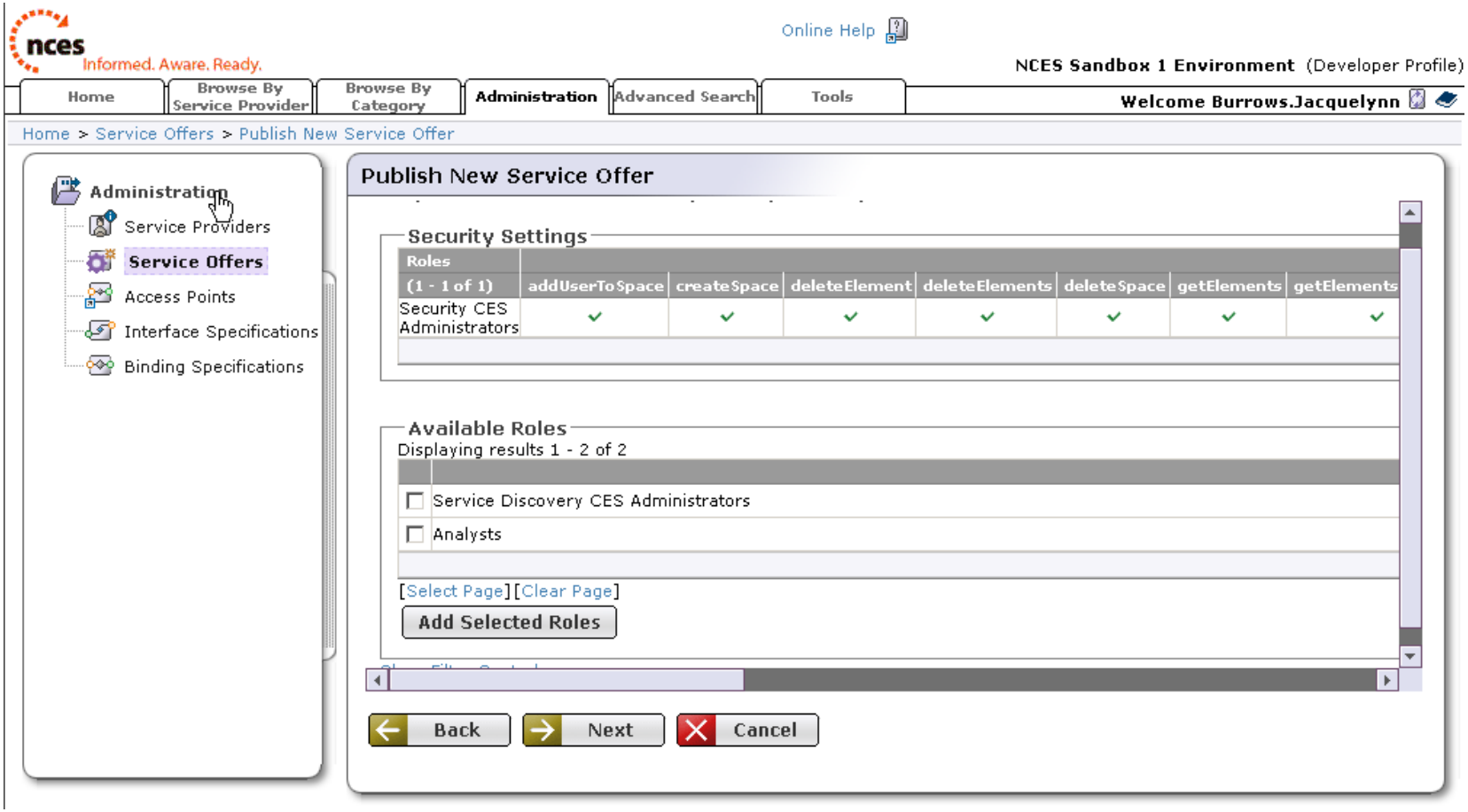
Note: categories have already been added in the screenshot above.

Publish a New Service Offer – Step Thirteen



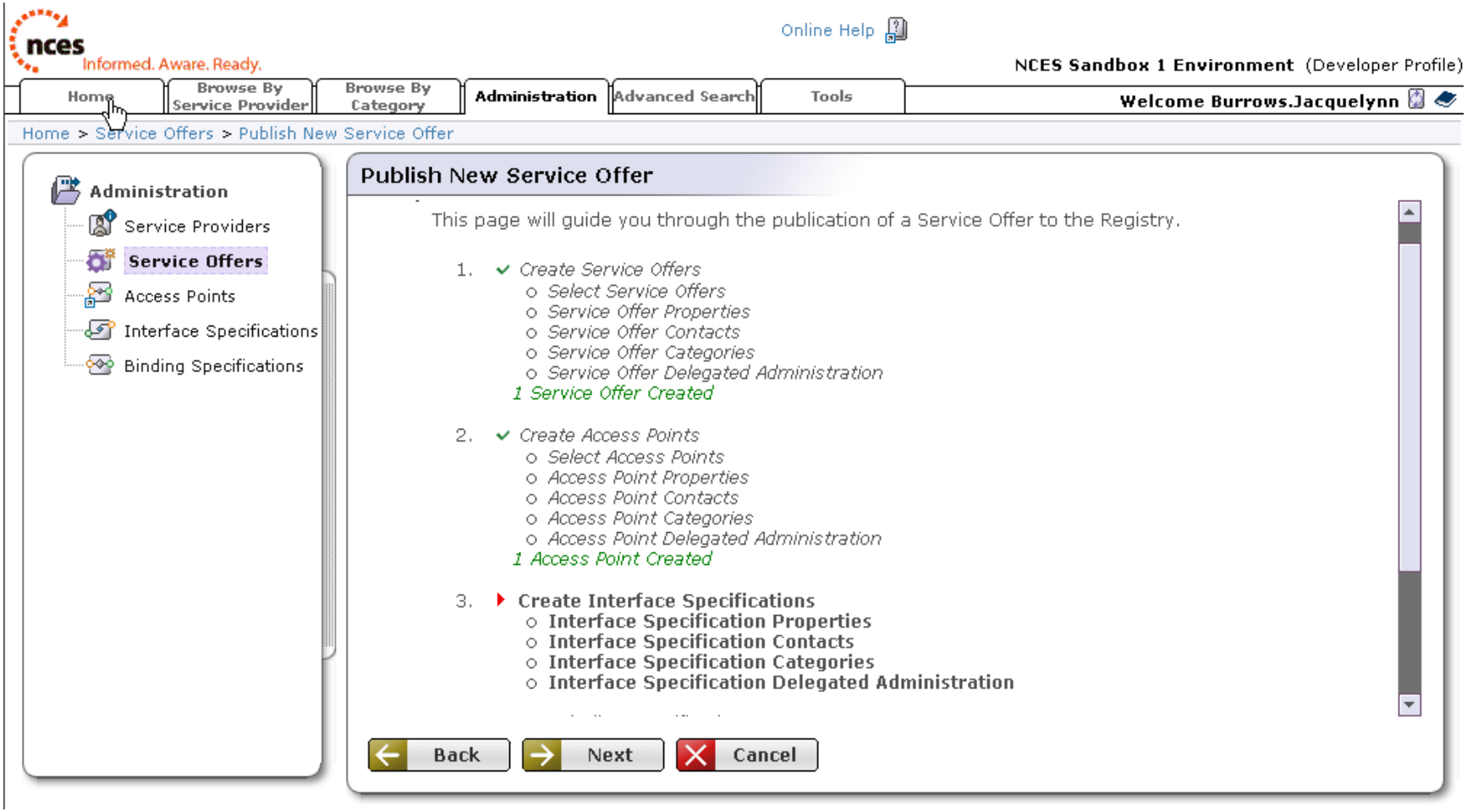
- **Set up the delegated administration for the access point. For detailed instructions on using the delegated administration follow the instructions described in the Delegated Administration Component section.**

Publish a New Service Offer – Step Fourteen



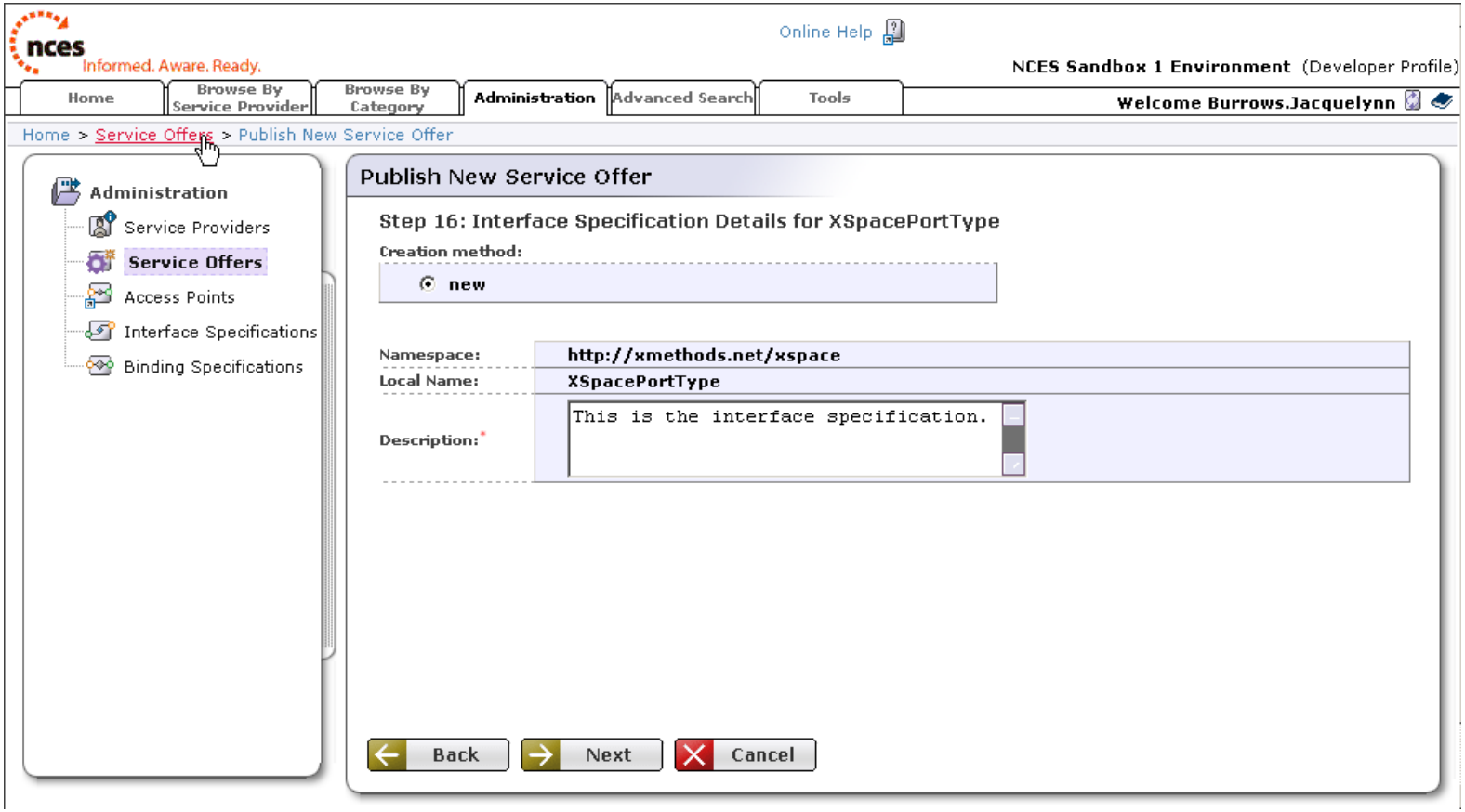
- **Set up the security policy for the access point through integration with the NCES Service Security component. If the access point is not integrated with NCES Service Security, this step may be skipped. For complete instructions on the access point security component, see the Access Point Security**

Publish a New Service Offer – Step Fifteen



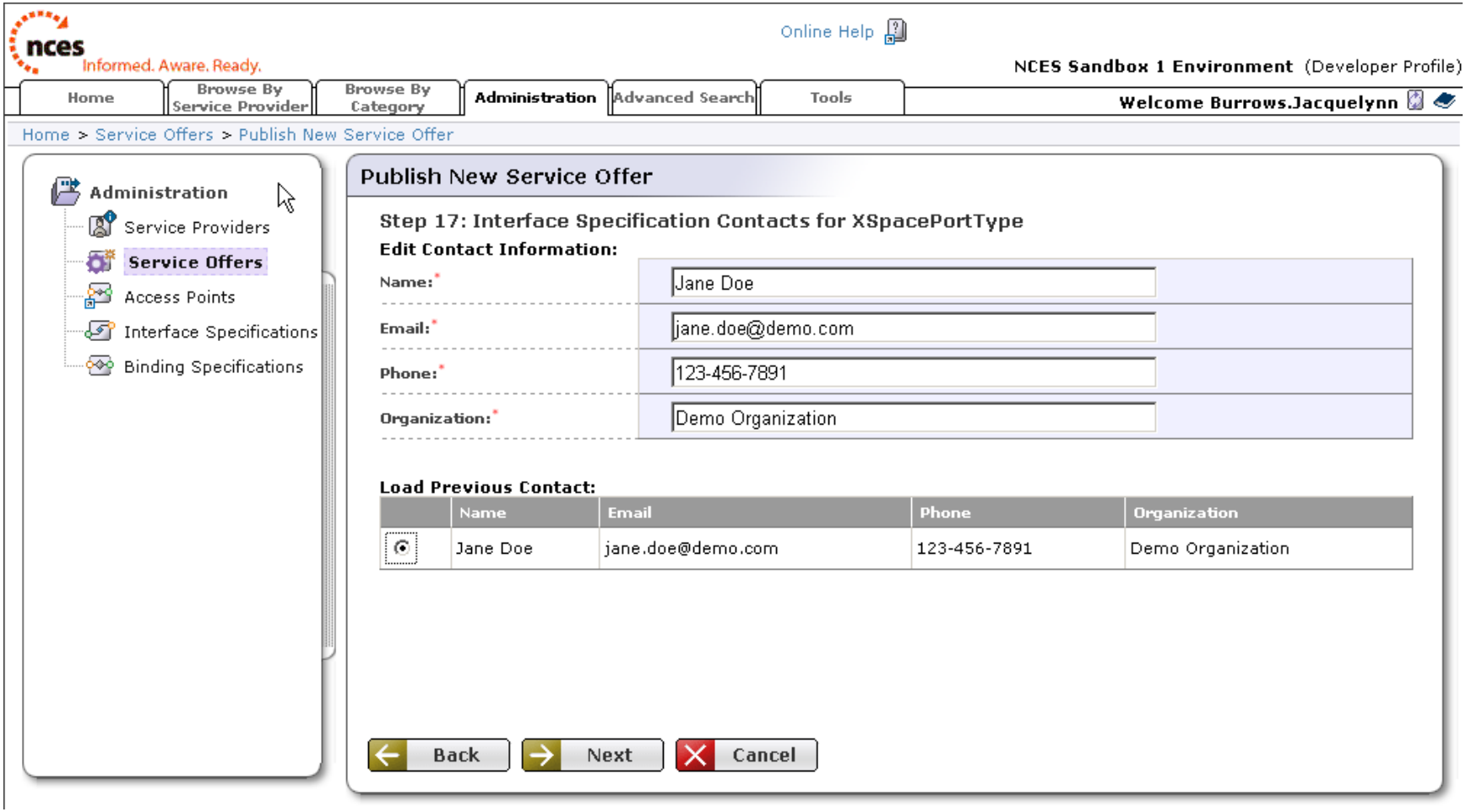
- **This step indicates that the service offer and the access points have been created successfully. To start the creation of interface specifications, click the Next button.**

Publish a New Service Offer – Step Sixteen



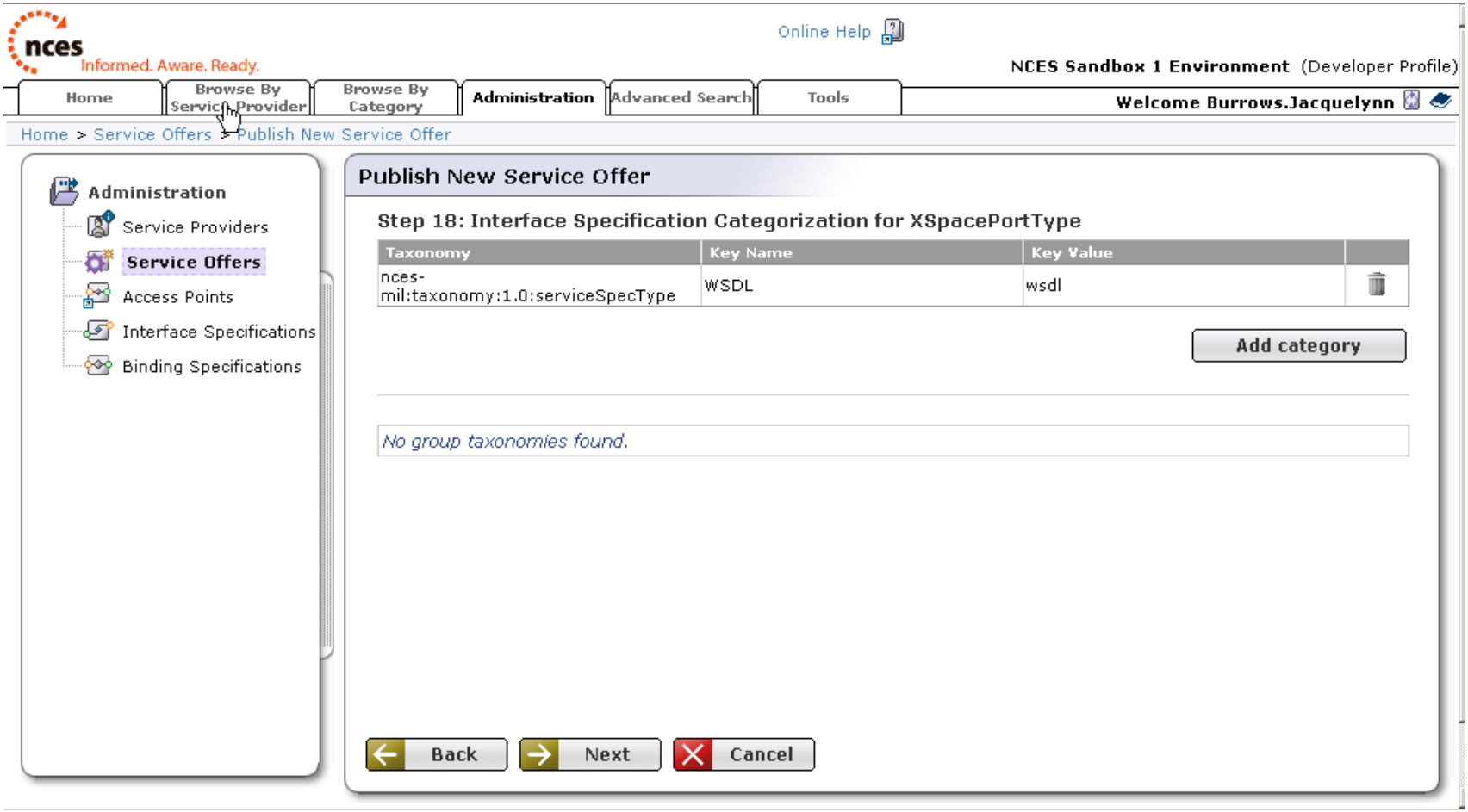
- **Enter basic information about the interface specification: interface specification namespace, interface specification local name, and interface specification description. Interface specification Namespace and Local Name values are obtained from the WSDL document and are read-only information. The interface specification Description field can be edited (maximum**

Publish a New Service Offer – Step Seventeen



- **Enter point of contact information for the interface specification, or select the radio button next to a previous contact in the Load Previous Contact list. All fields are mandatory (maximum character length of 255 for each field).**

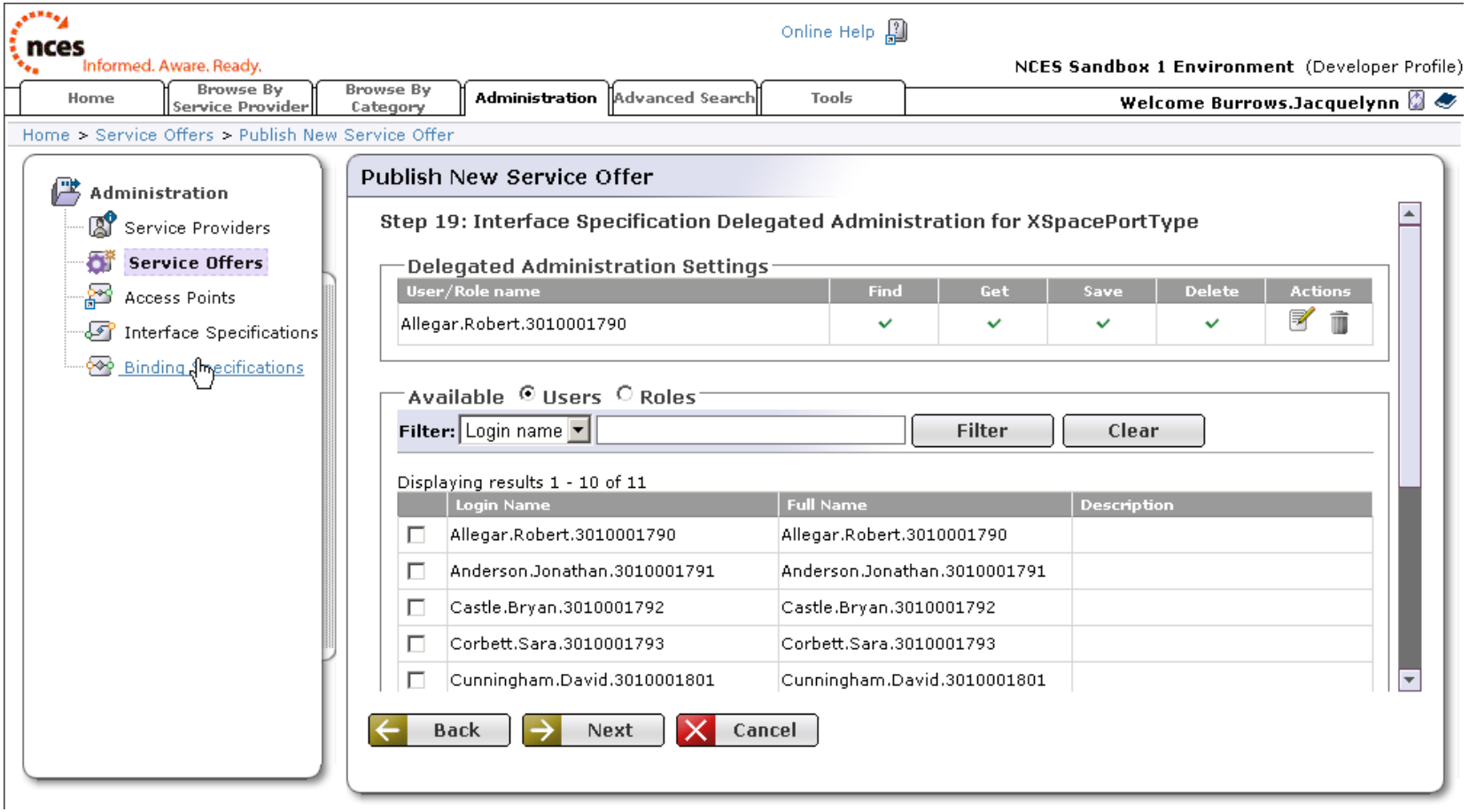
Publish a New Service Offer – Step Eighteen



- **Add categories to the interface specification using available taxonomies. This step is mandatory.**

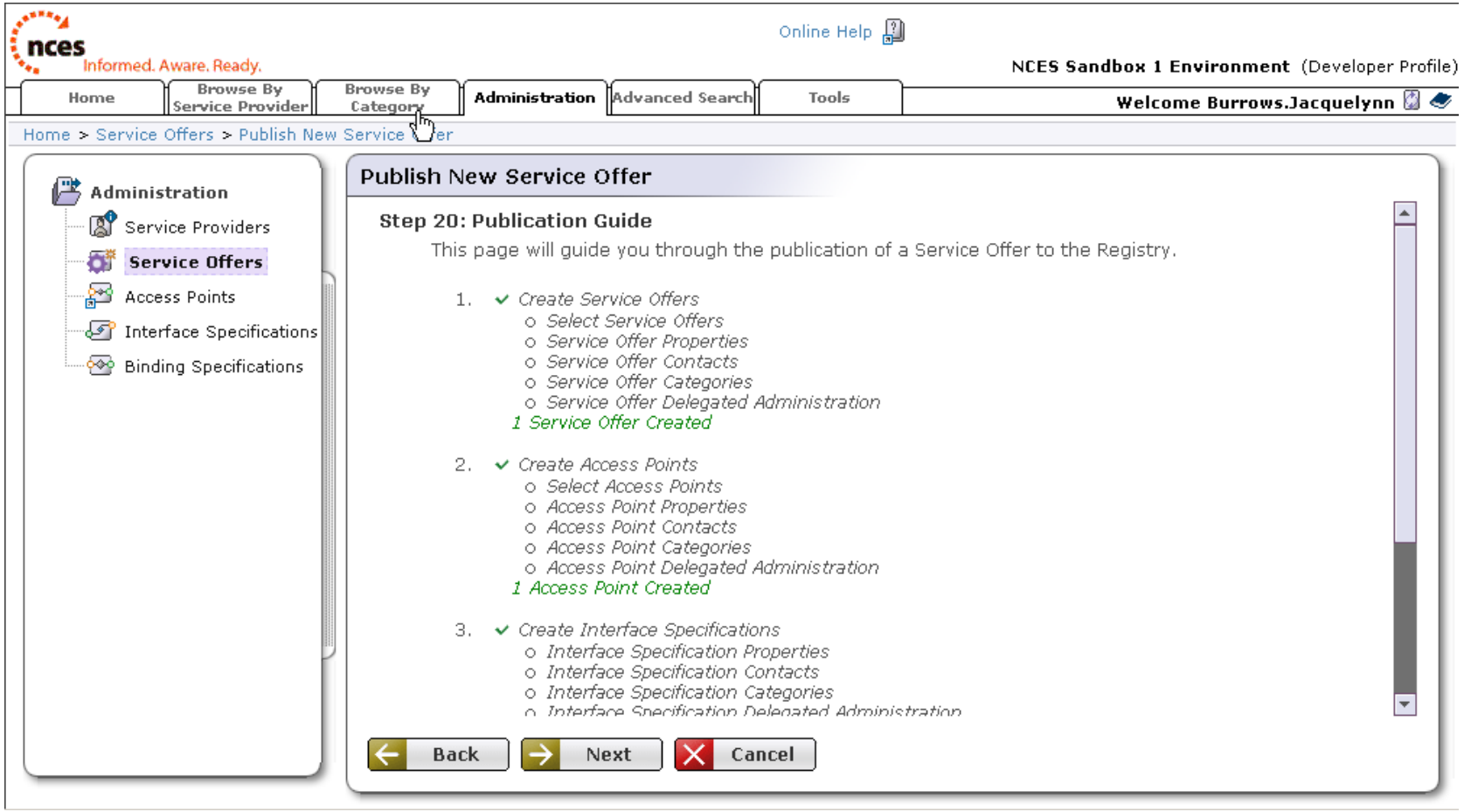
Note: categories have already been added in the screenshot above.

Publish a New Service Offer – Step Nineteen



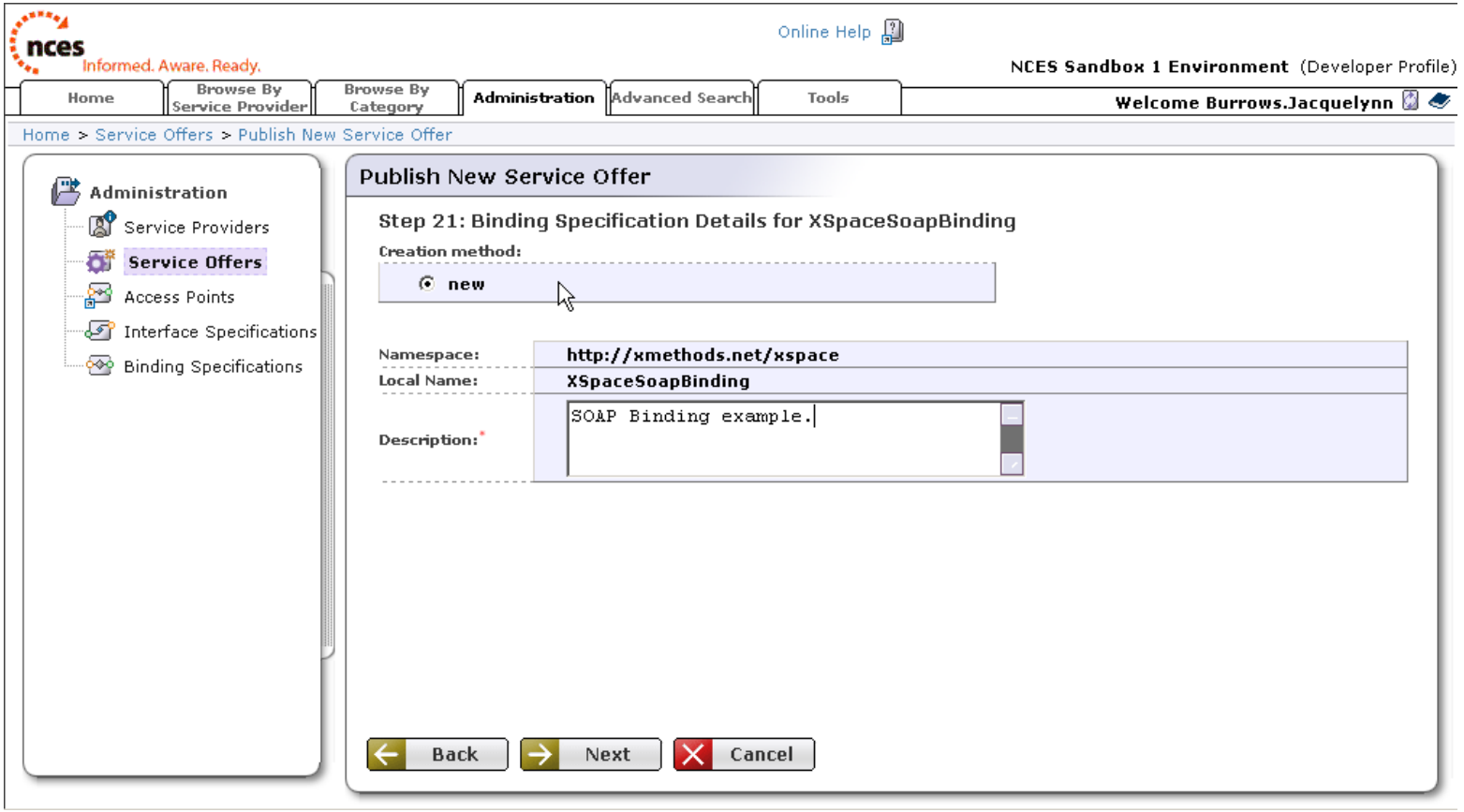
- **Set up the delegated administration for the interface specification. For detailed instructions on using the delegated administration follow the instructions described in the Delegated Administration Component section.**

Publish a New Service Offer – Step Twenty



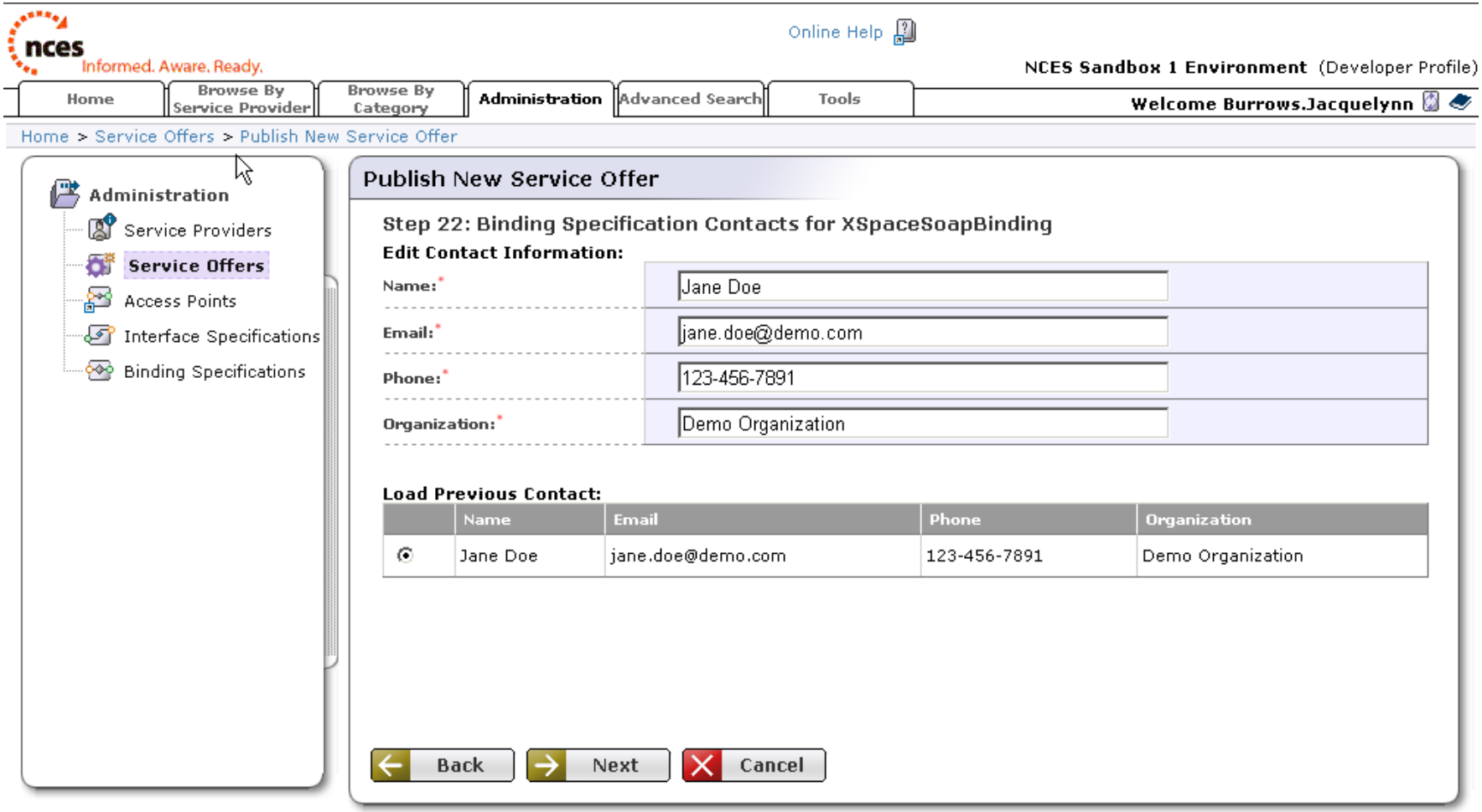
- **This step indicates that the service offer, the access points, and the interface specifications have been created successfully. To start the creation of the binding specifications, click the Next button.**

Publish a New Service Offer – Step Twenty-one



- **Enter basic information about the binding specification: binding specification namespace, binding specification local name, and binding specification description. Binding specification Namespace and Local Name values are obtained from the WSDL document and are read-only information. The binding specification Description field can be edited (maximum**

Publish a New Service Offer – Step Twenty-two



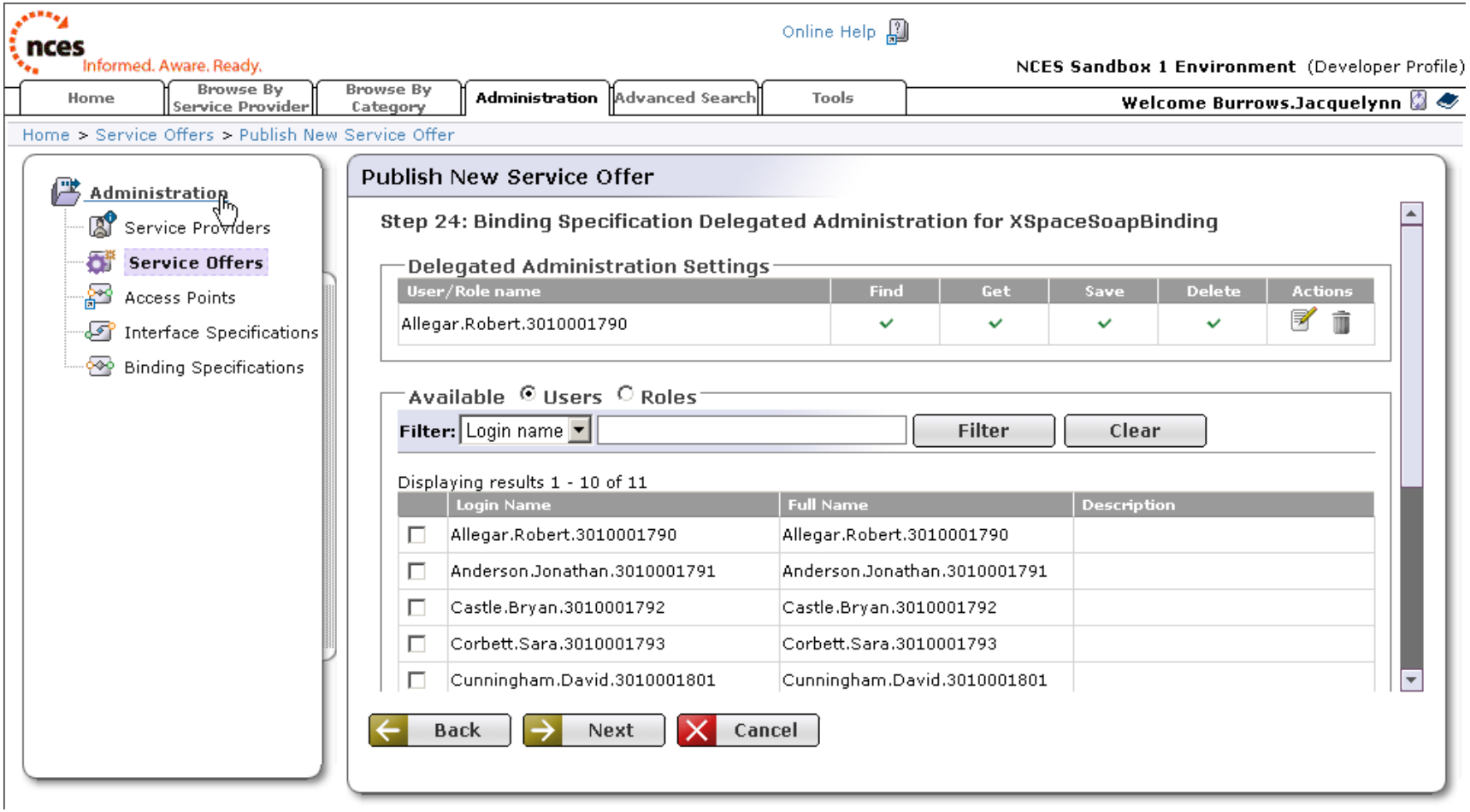
- **Enter point of contact information for the binding specification, or select the radio button next to a previous contact in the Load Previous Contact list. All fields are mandatory (maximum character length of 255 for each field).**

Publish a New Service Offer – Step Twenty-three

- **Add categories to the binding specification using available taxonomies. This step is mandatory.**

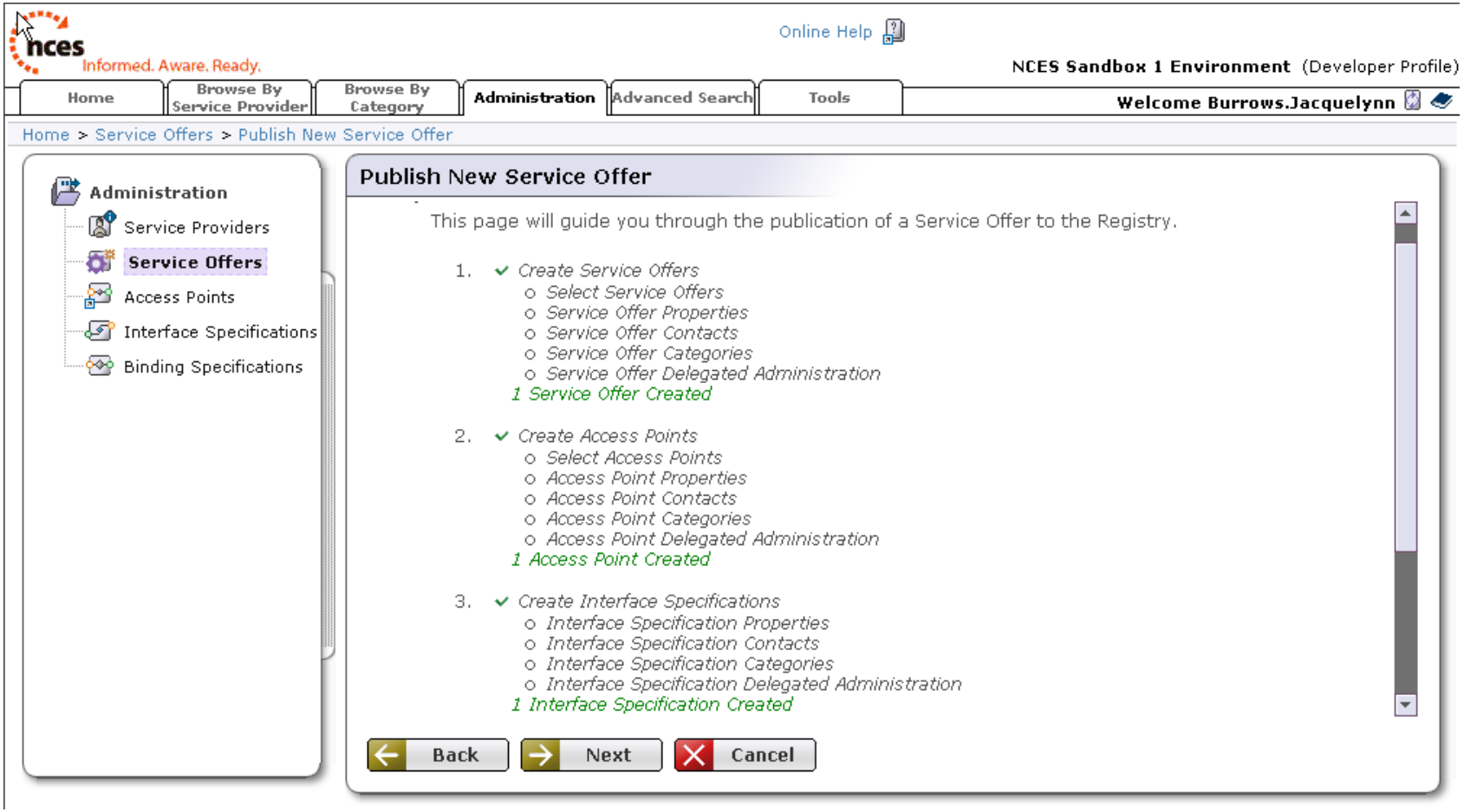
Note: categories have already been added in the screenshot above.

Publish a New Service Offer – Step Twenty-four



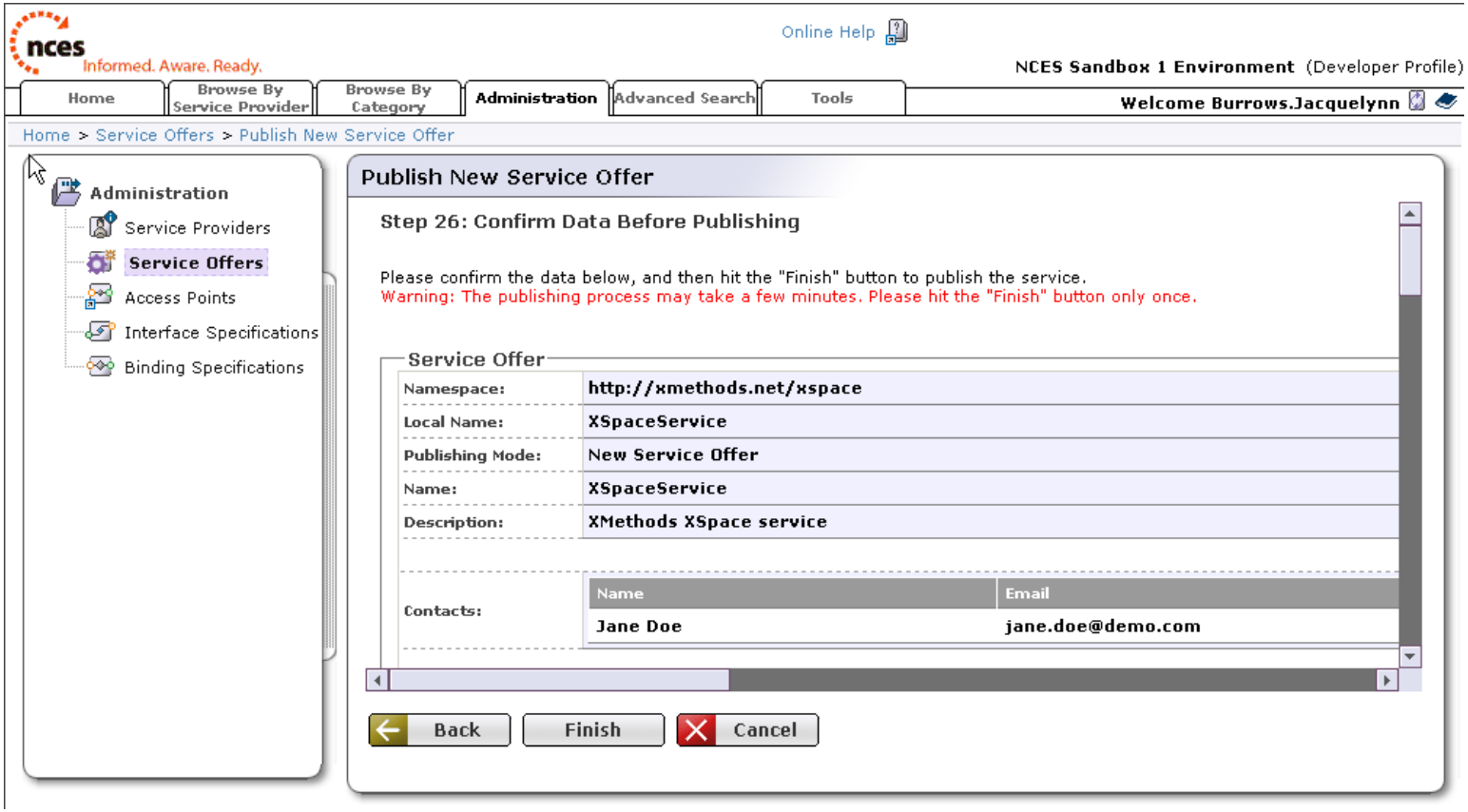
- **Set up the delegated administration for the binding specification. For detailed instructions on using the delegated administration follow the instructions described in the Delegated Administration Component section.**

Publish a New Service Offer – Step Twenty-five



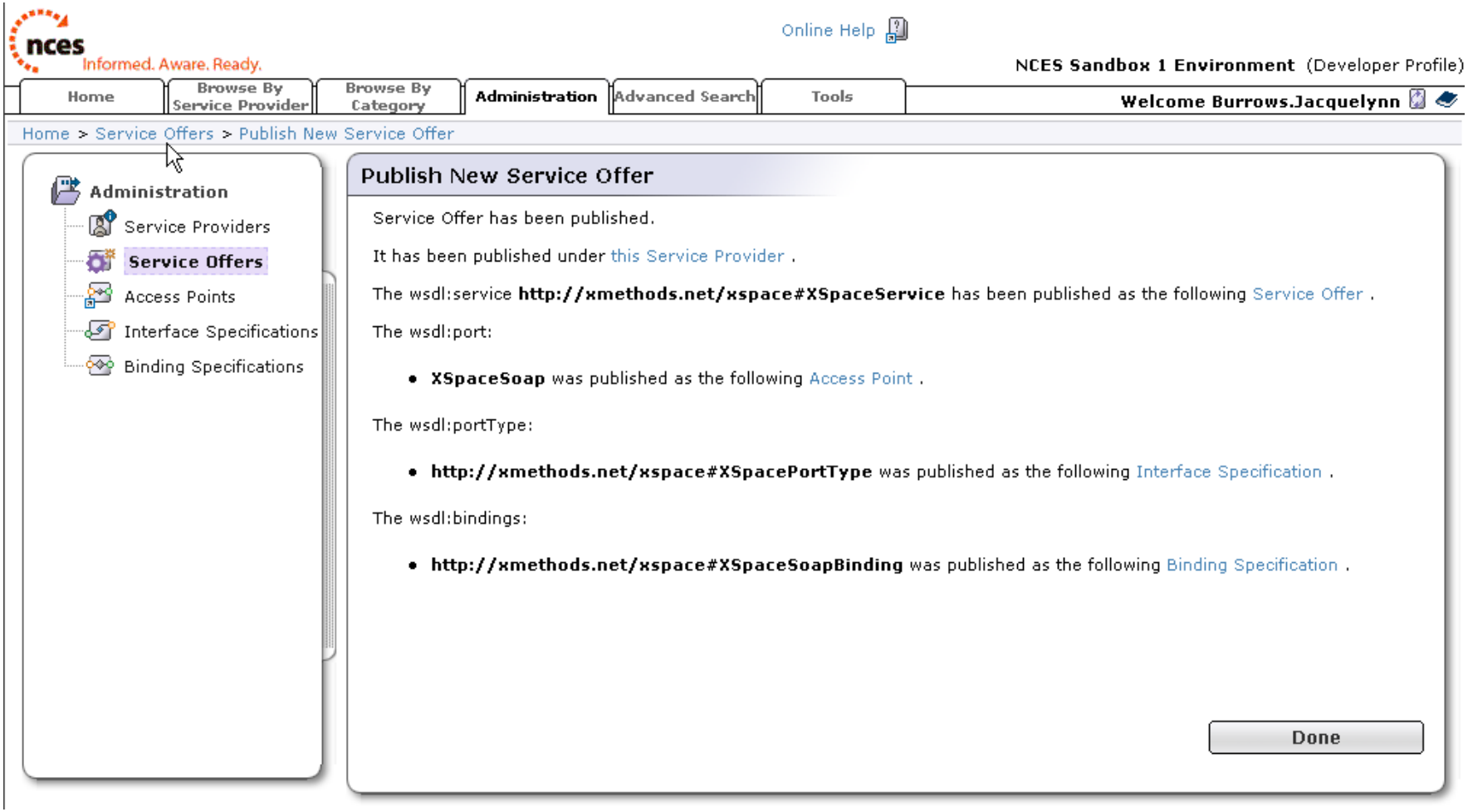
- **This step indicates that the service offer, the access points, the interface specifications, and the binding specifications have been created successfully. To confirm the data before publishing the service offer, click the Next button.**

Publish a New Service Offer – Step Twenty-six



- **Review all the information entered for the service offer during the publishing process: the access points, the interface specifications, and the binding specifications. If a change is desired, click the corresponding edit icon to go to the detail view and update the information.**
- **After reviewing and confirming the data, click the Finish button**

Publish a New Service Offer – Confirmation

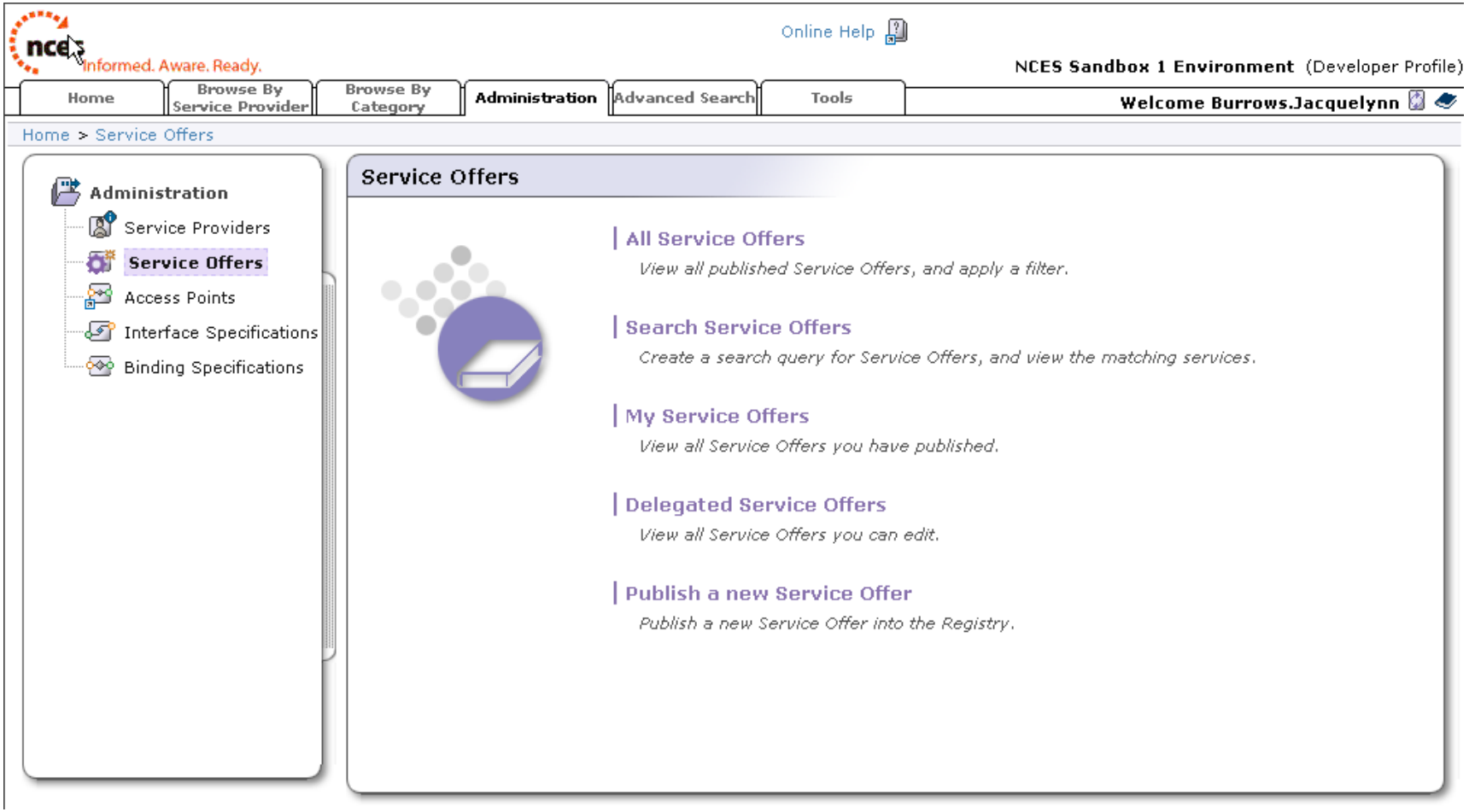


- **This page indicates that the service offer has been published.**

Edit a Service Offer

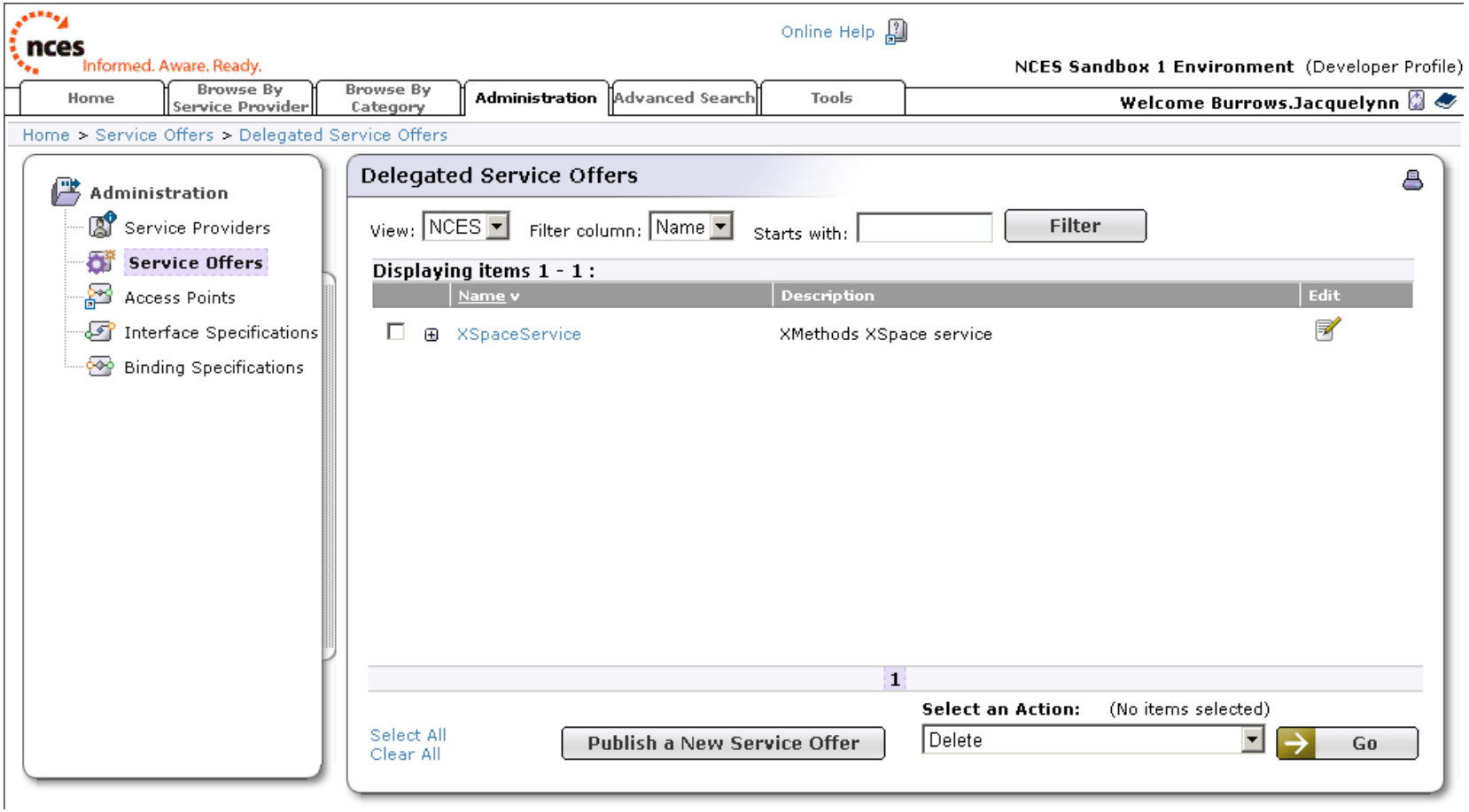
This section describes detailed instructions for using the Edit a Service Offer functionality.

Edit a Service Offer – Service Offer View



- **In the Administration tab, click the Service Offers link in the left pane and then click the Delegated Service Offers link in the right pane.**

Edit a Service Offer – Main Page

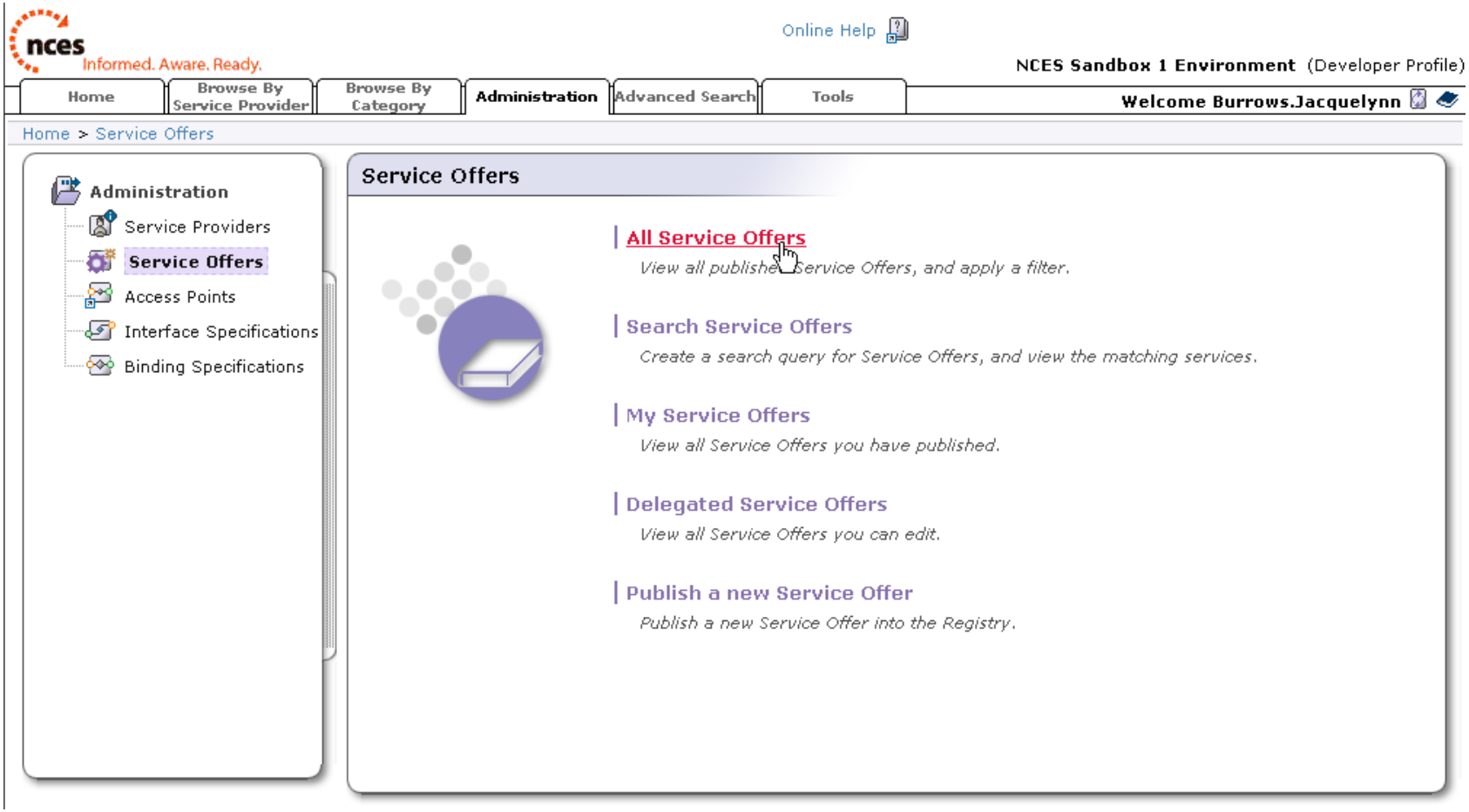


- **To edit a Service Offer, click on the Edit icon on right side of the page next to the service offer you wish to edit.**
- **Steps 1 – 5 of the Editing process match that of steps 3 – 7 of the Publish process. Refer to steps 3 – 7 of the Publishing a Service Offer section for further details.**

View a Service Offer

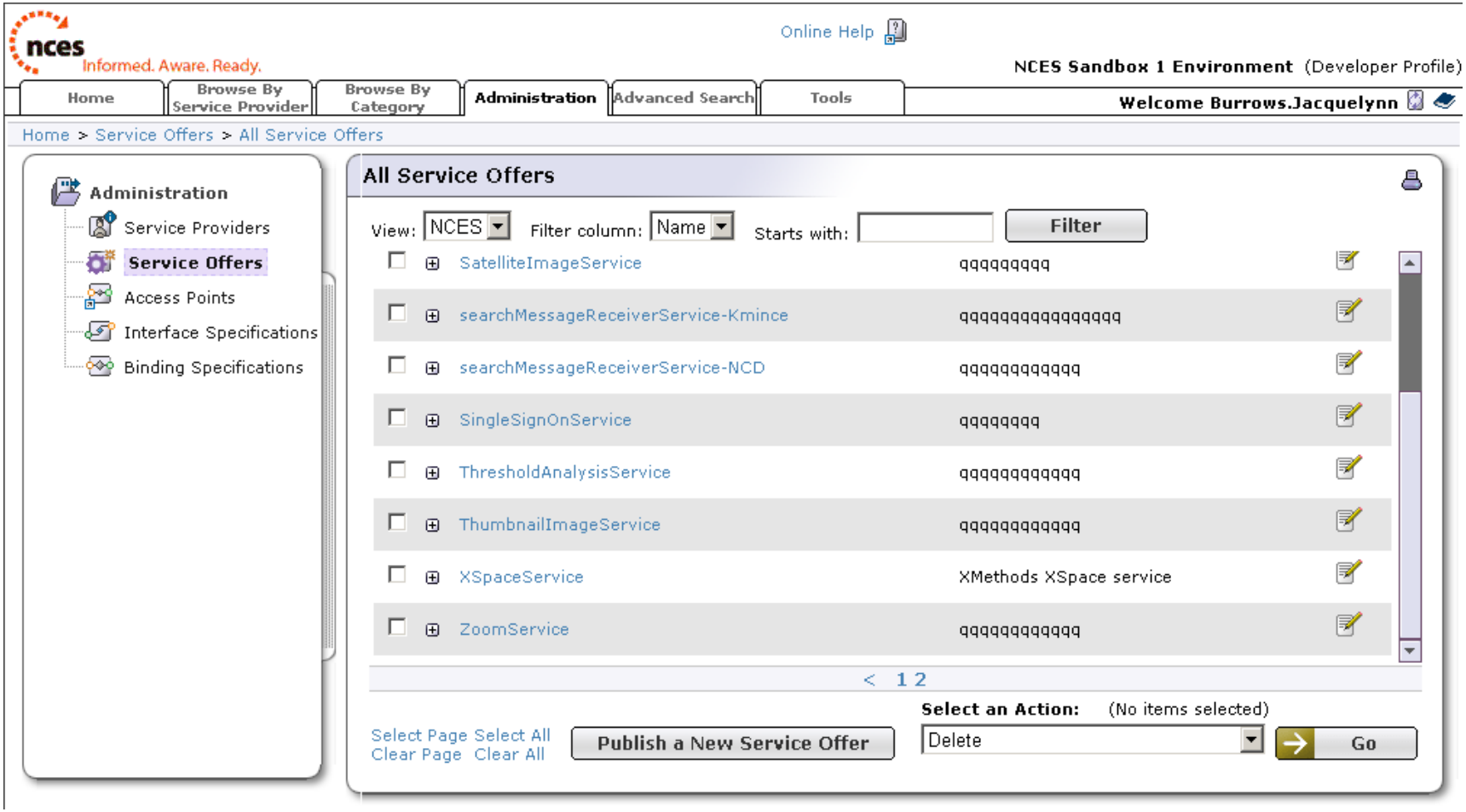
This section describes detailed instructions for using the View a Service Offer functionality.

View a Service Offer – Main Page



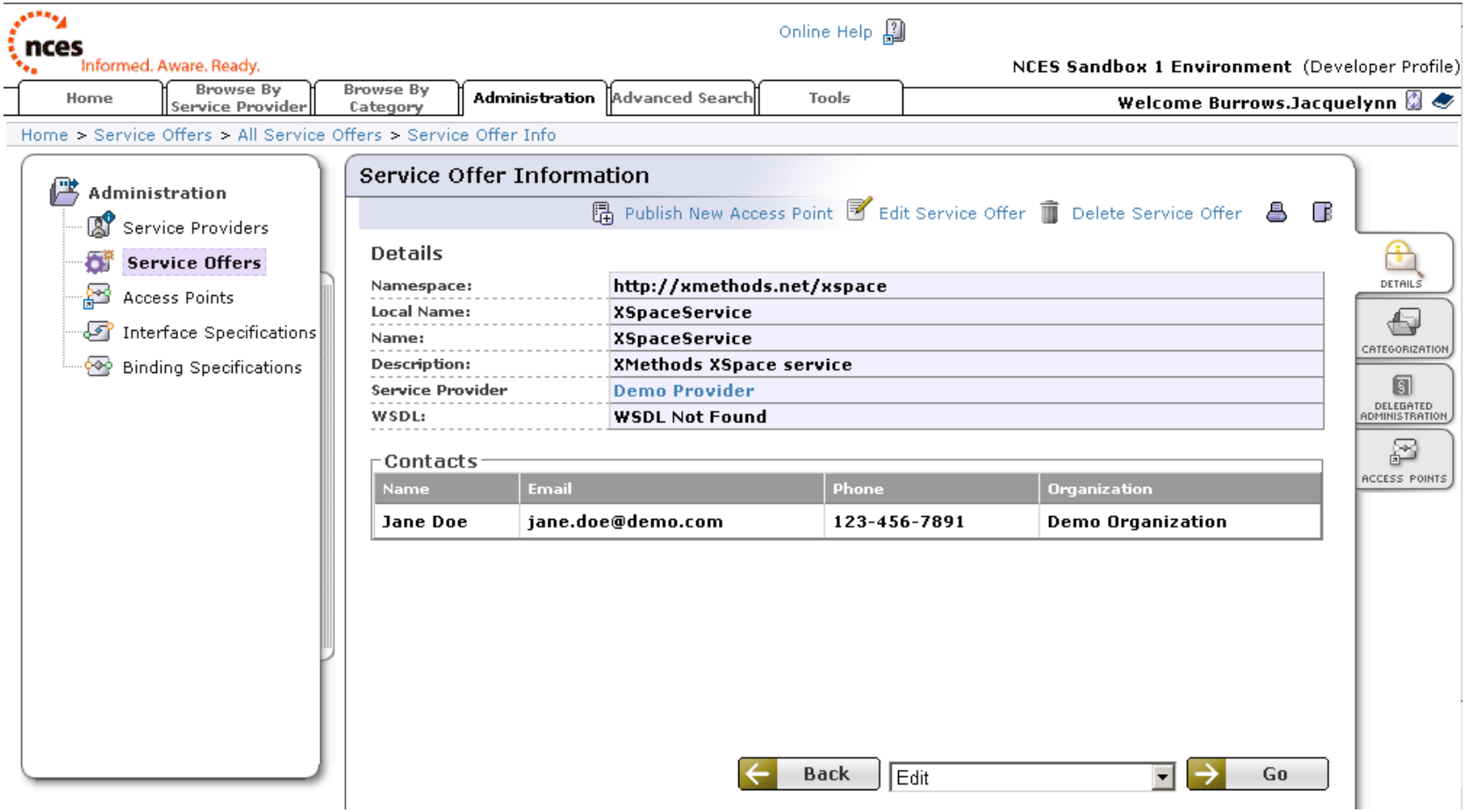
- **To browse for service offers, click the All Service Offers link from the Administration tab or from the advanced search results list.**

View a Service Offer – Main Page



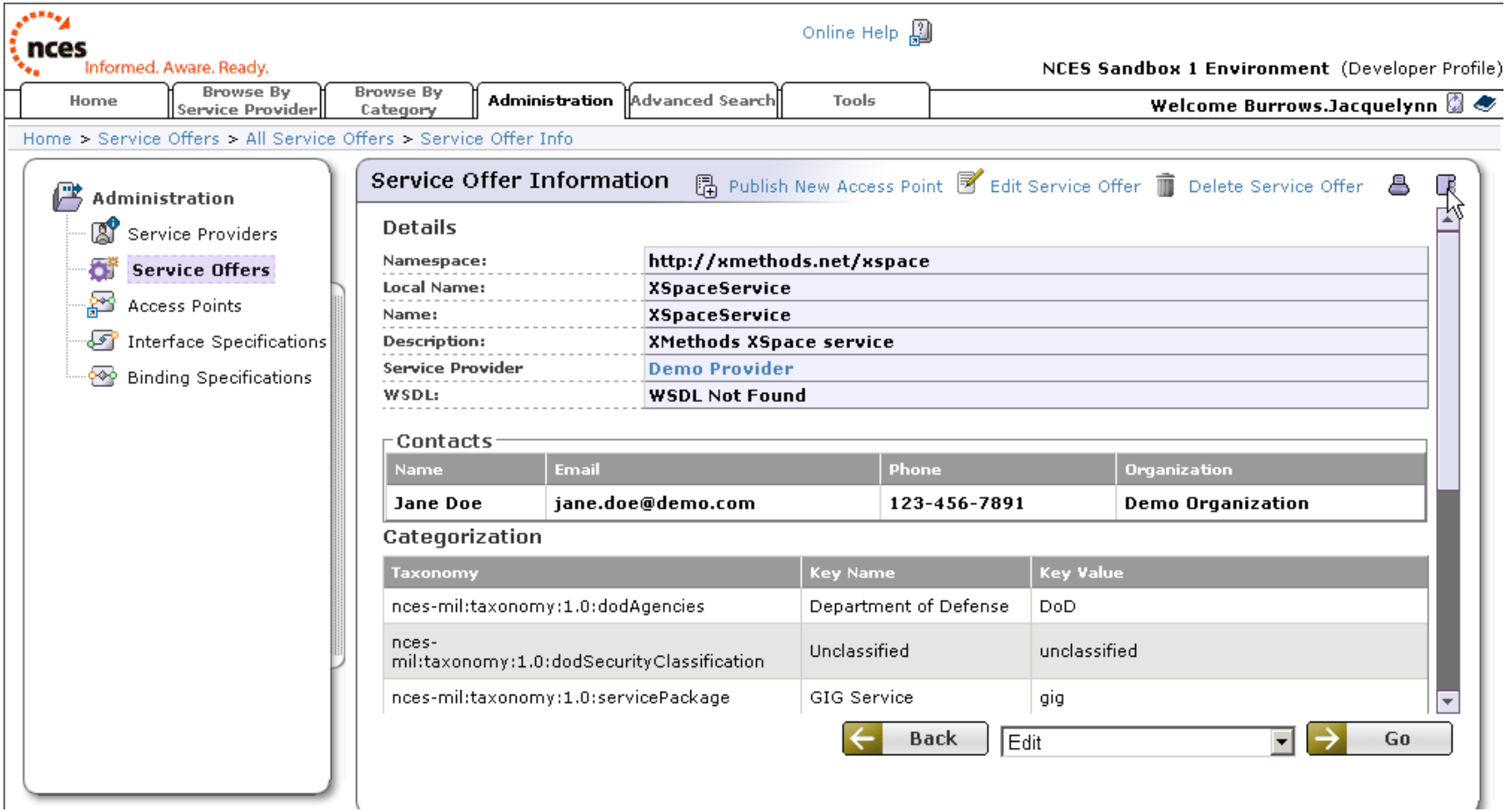
- **To view the detail information of a service offer, click the service offer link from the list of service offers or the advanced search result list.**

View a Service Offer – Tabbed View



- **The screen above shows the Service Offer Details tab, and service offer name, service offer namespace, service offer local name, service offer description, service provider and service offer contacts. To view other tabs, click the corresponding tab on the right hand side.**

View a Service Offer – Summary View

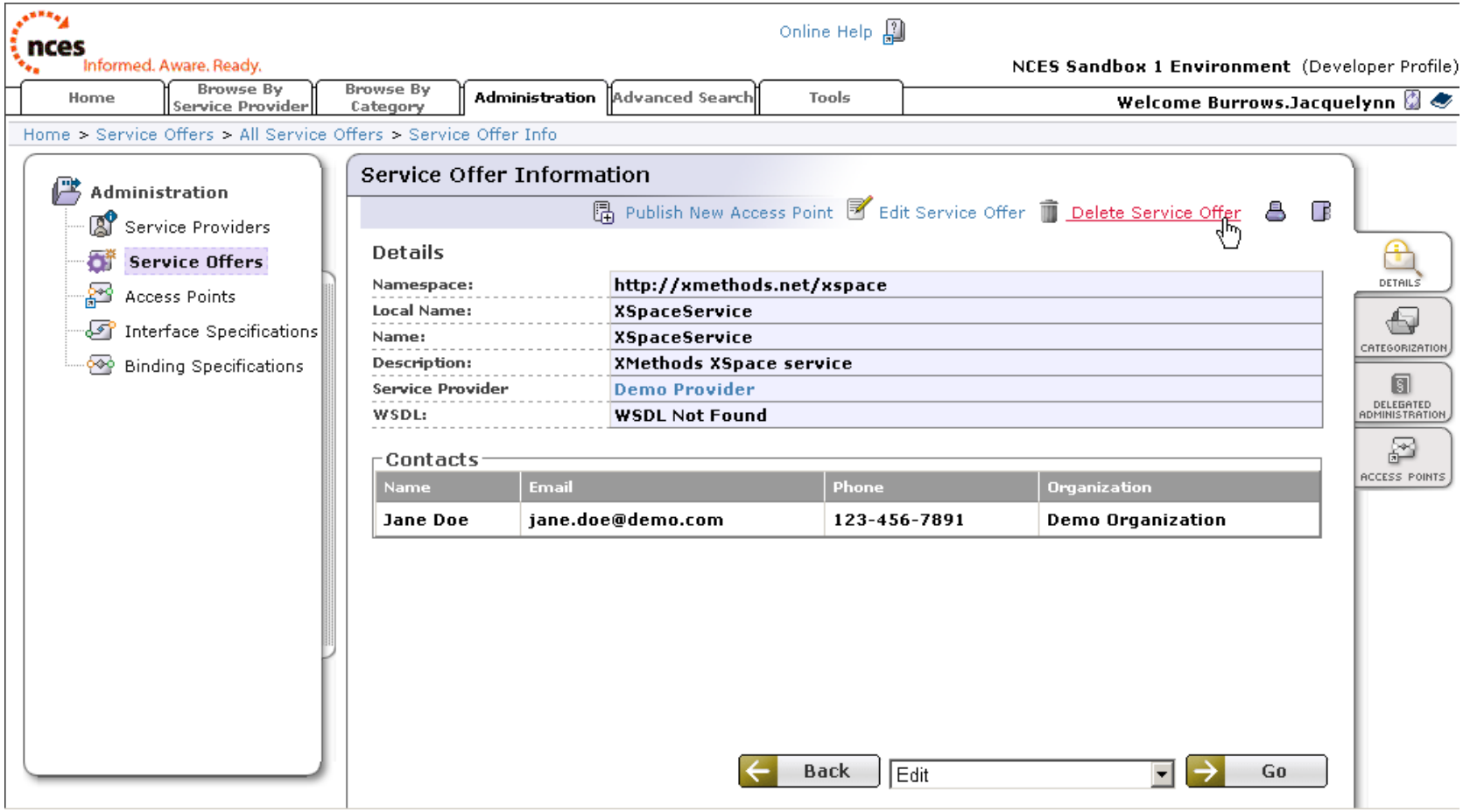


- **To view the service offer detail information without tabs, click the Show/Hide Tab icon on the top right side of the screen.**

Delete a Service Offer

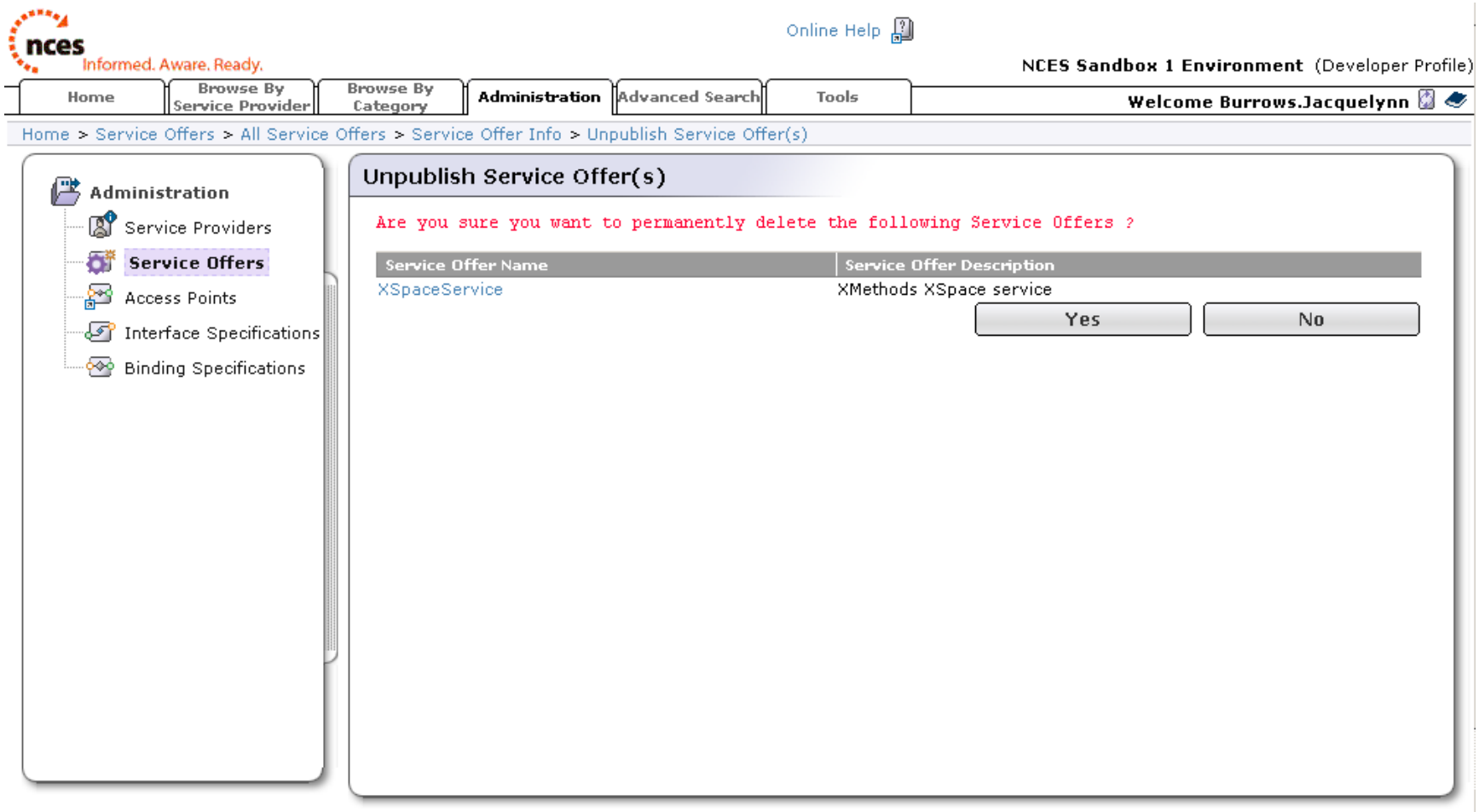
This section describes detailed instructions for using the Delete a Service Offer functionality.

Delete a Service Offer



- **To delete a service offer, on a service offer view, click the Delete Service Offer link on the top right side or choose Delete from the drop down menu on the bottom right corner and click the Go button.**

Delete a Service Offer - Confirmation

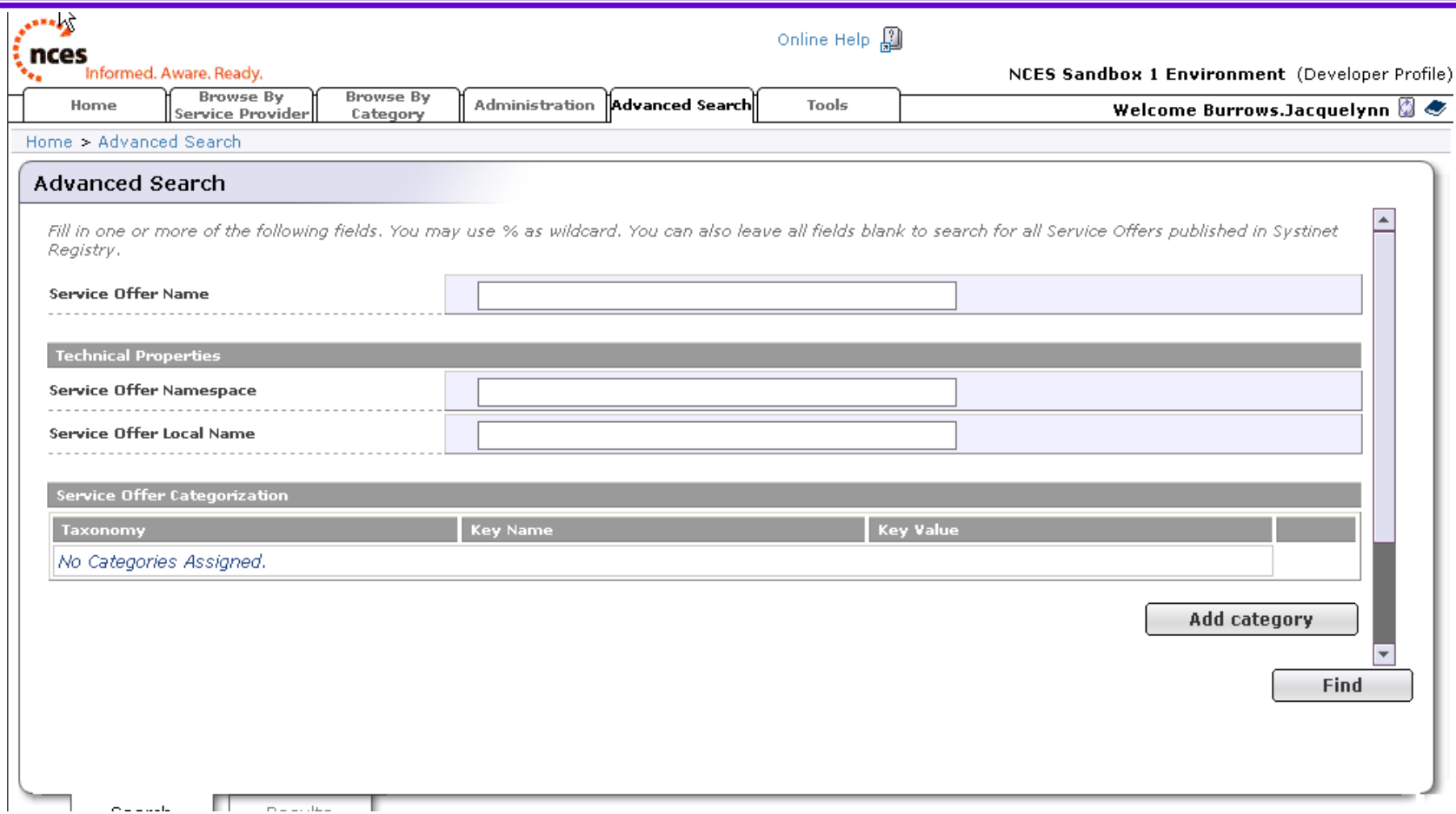


- **The screen above will display after choosing to delete a service offer. To continue, click Yes. To cancel, click No.**

Advanced Search

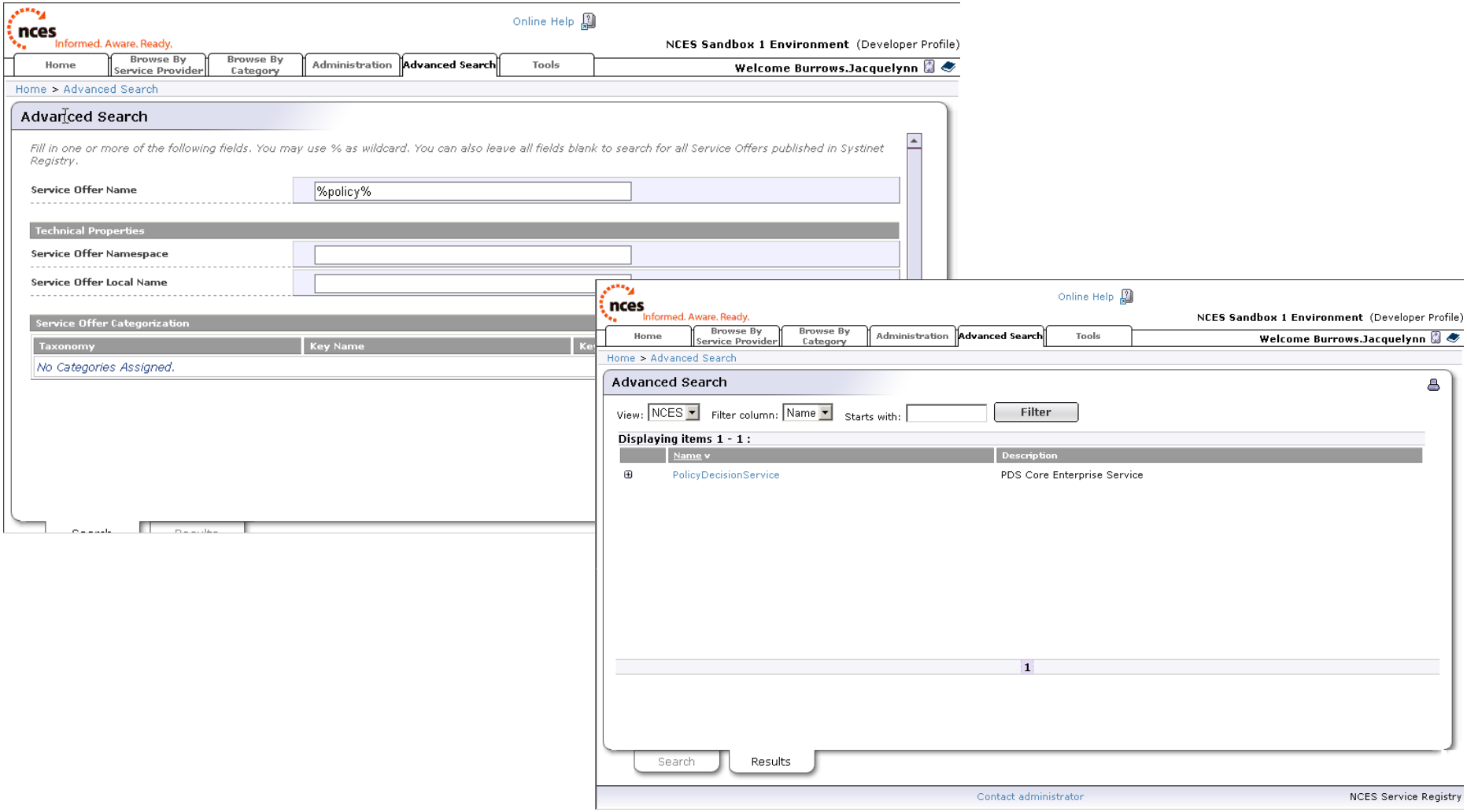
This section describes detailed instructions for performing an advanced search on the Service Offers in the NCES Service Registry.

Advanced Search – Main Page



- **Click the Advanced Search tab.**
- **The advanced search GUI does not yet support complex logic relationship such as AND, OR, and NOT among multiple search criteria. All search criteria are considered conjunctional (AND) and must all be met. The percent symbol % may be used as the wildcard character while**

Advanced Search - By Service Offer Name and Service Offer Category

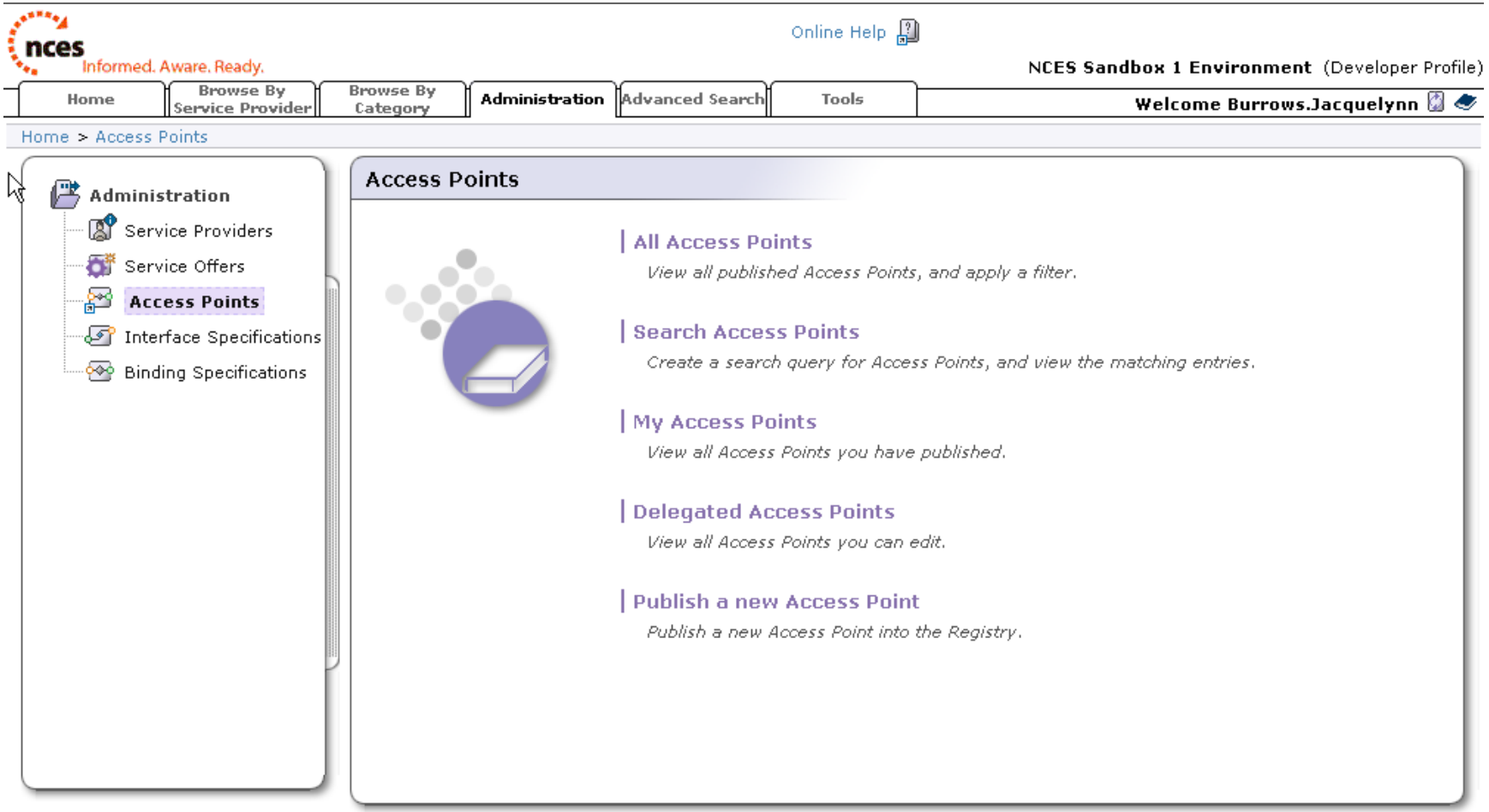


- **This slide shows the search criteria and the corresponding search result for the service offers with Service Offer Name containing "policy."**

Publish an Access Point

This section describes detailed instructions for using the Publish a New Access Point functionality.

Publish a New Access Point – Main Page

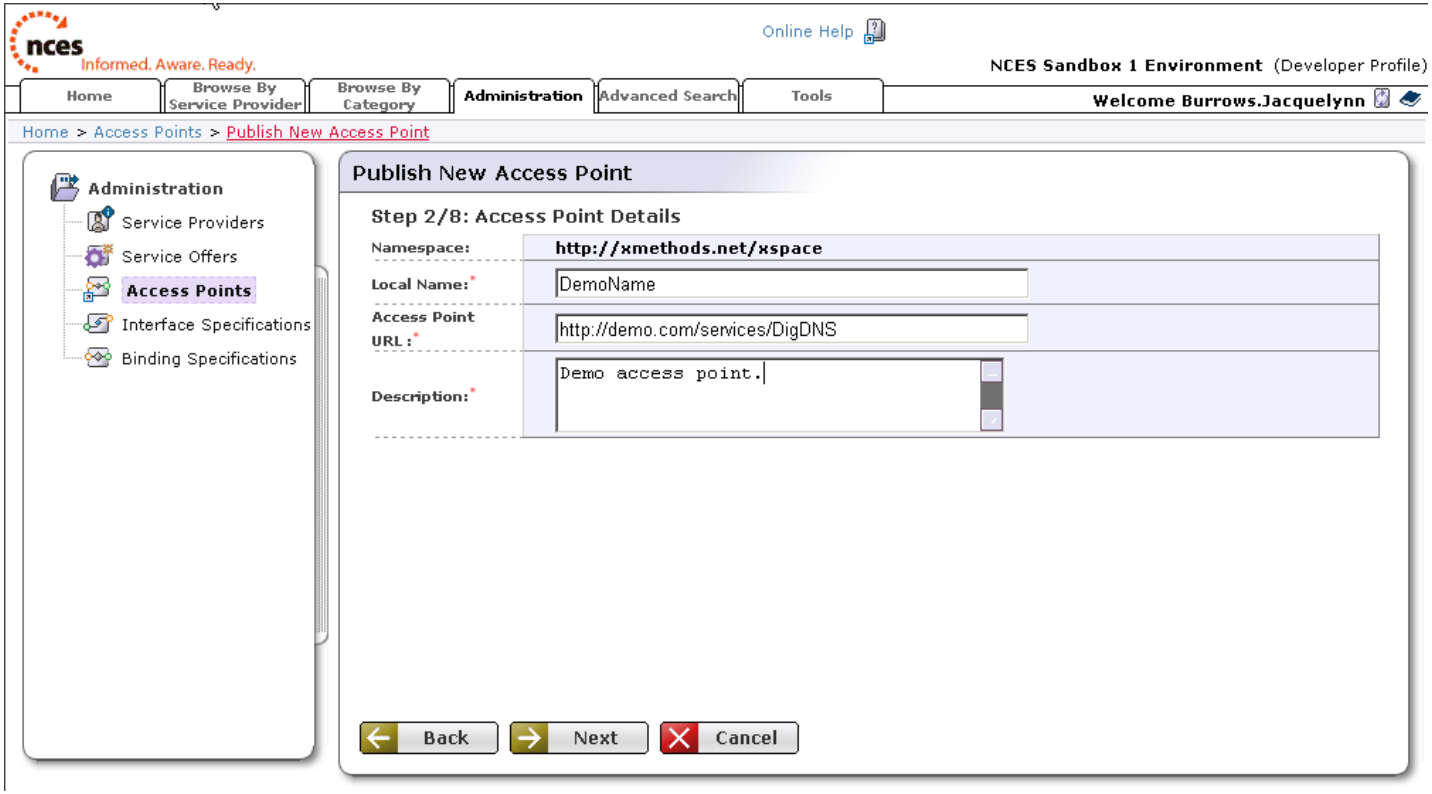


- **In the Administration tab, click the Access Points link in the left pane and then click the Publish a new Access Point link in the right pane.**

Publish a New Access Point – Step One

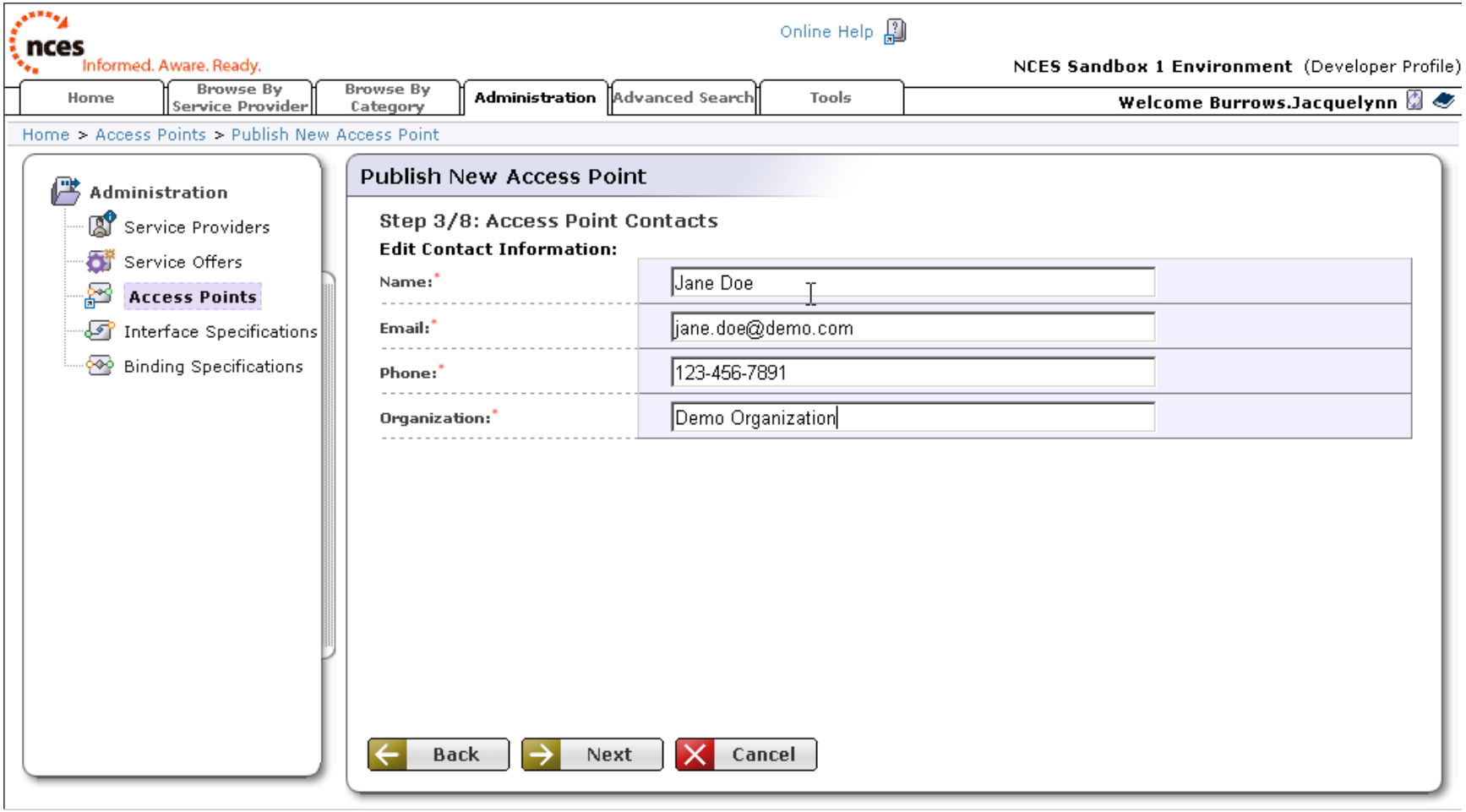
- Click the radio button next to the service offer under which you wish to publish. If the list becomes too long, the list will be split into multiple pages.
- To change pages, click the numbered links at the bottom of the

Publish a New Access Point – Step Two



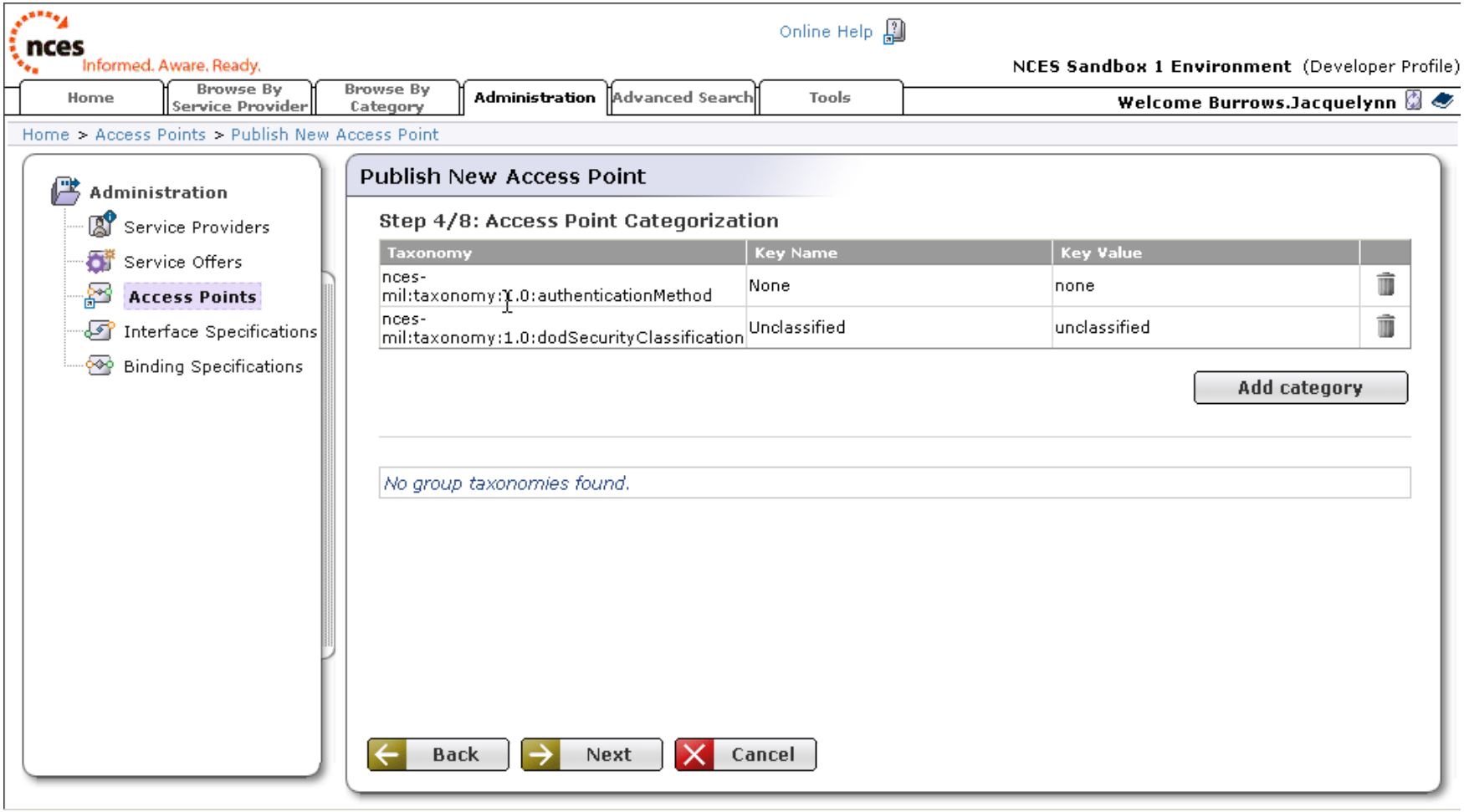
- **Enter basic information about the access point: access point namespace, access point local name, access point URL, and access point description. The access point Namespace value is obtained from the parent service offer and is read-only information. The access point Local Name field must be specified manually when publishing without a WSDL. The Access point URL and Description fields can be edited (maximum**

Publish a New Access Point – Step Three



- **Enter the point of contact information for the access point. All fields are mandatory (maximum character length of 255 for each field).**

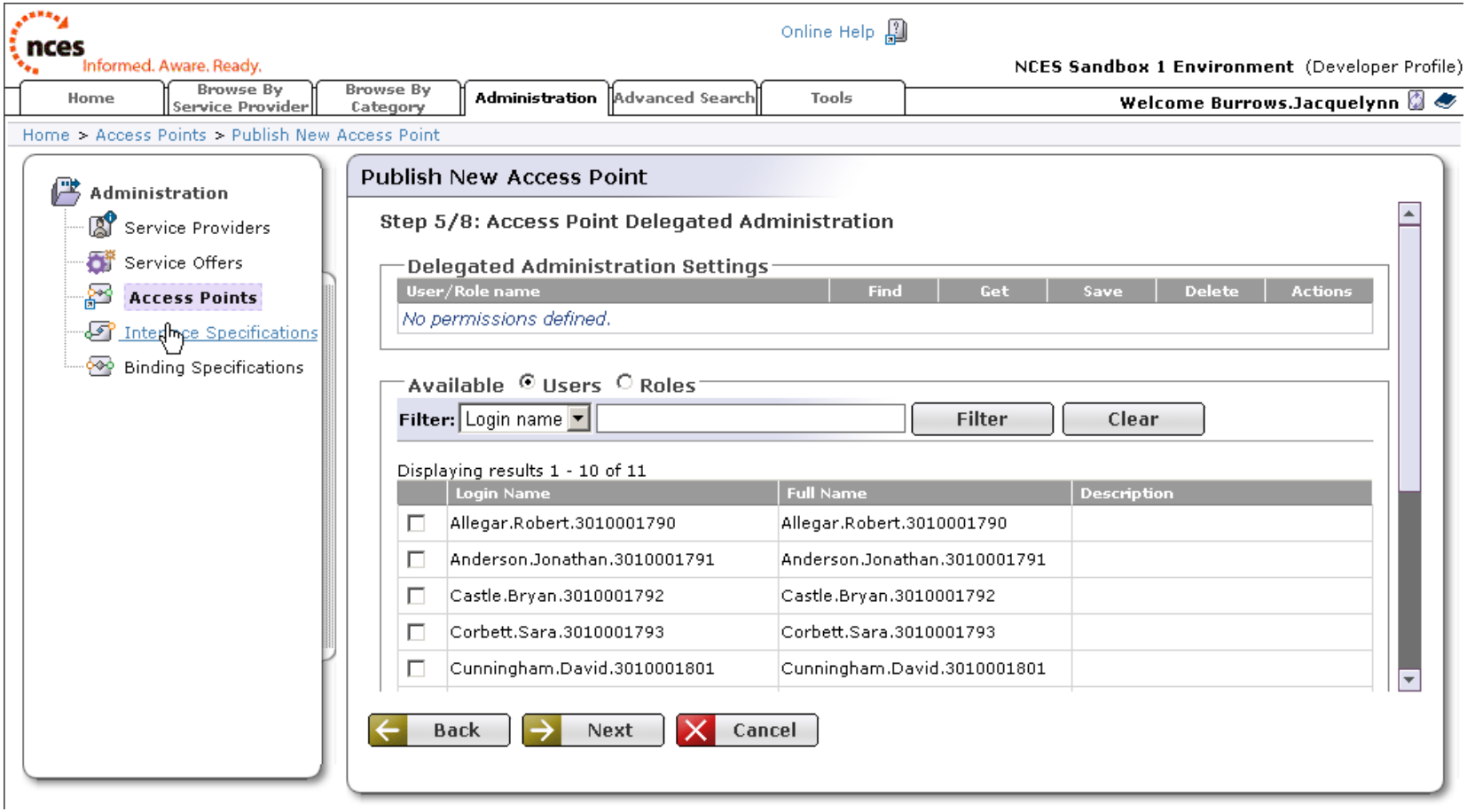
Publish a New Access Point – Step Four



- **Add categories to the access point using available taxonomies. This step is mandatory.**

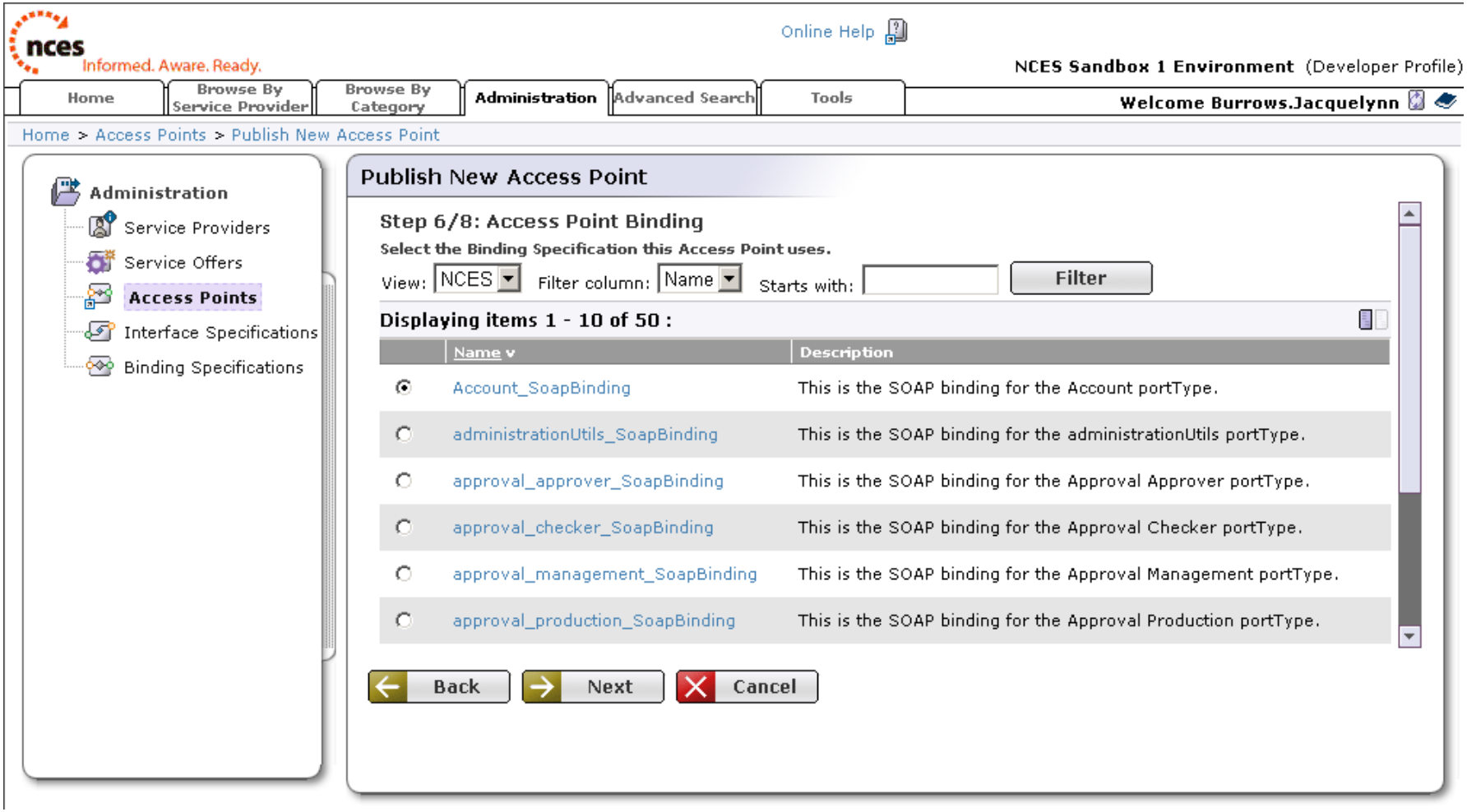
Note: categories have already been added in the screenshot above.

Publish a New Access Point – Step Five



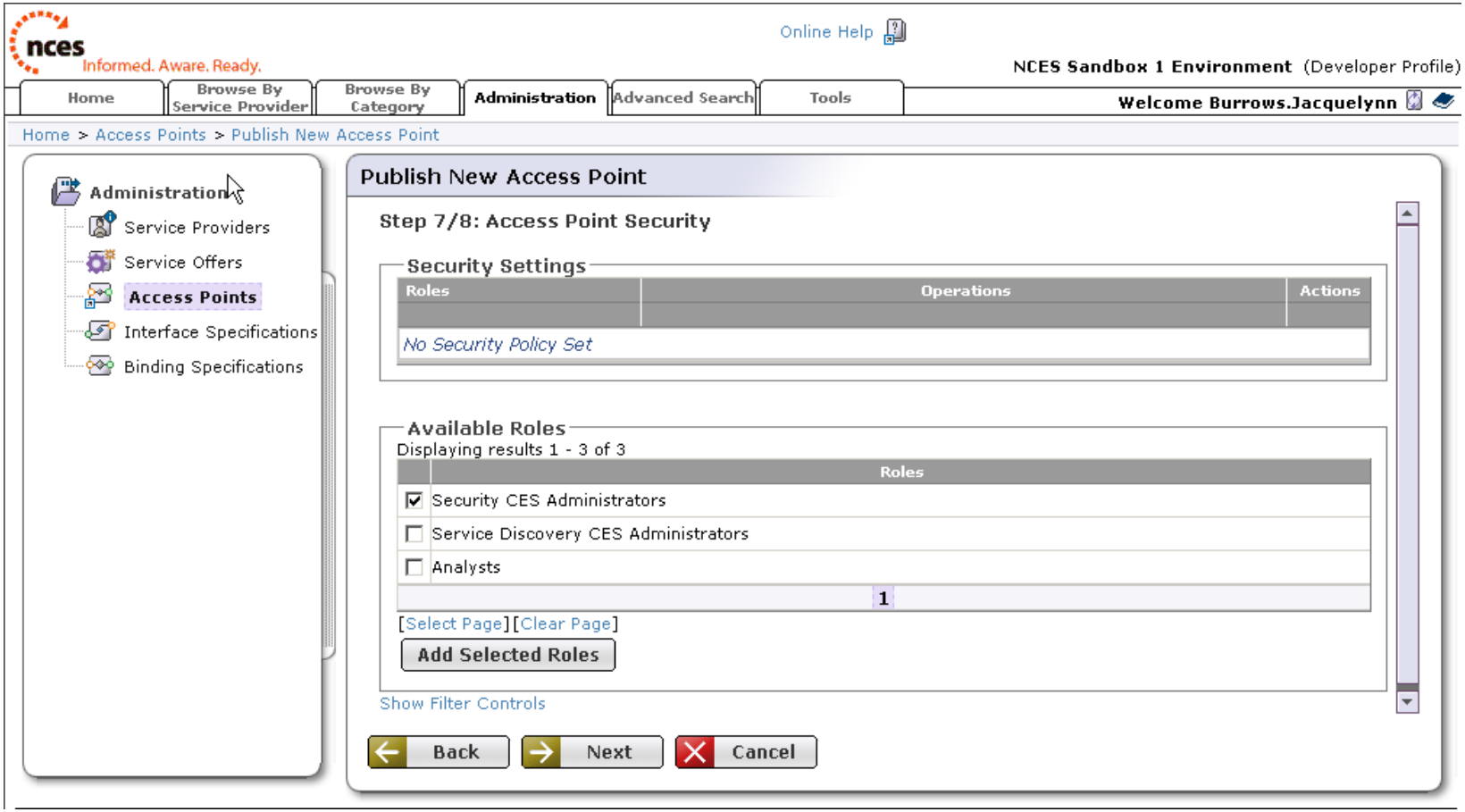
- **Set up the delegated administration for the service offer.**
- **To set up service provider delegated administration, follow the instructions described in the Delegated Administration Component section.**

Publish a New Access Point – Step Six



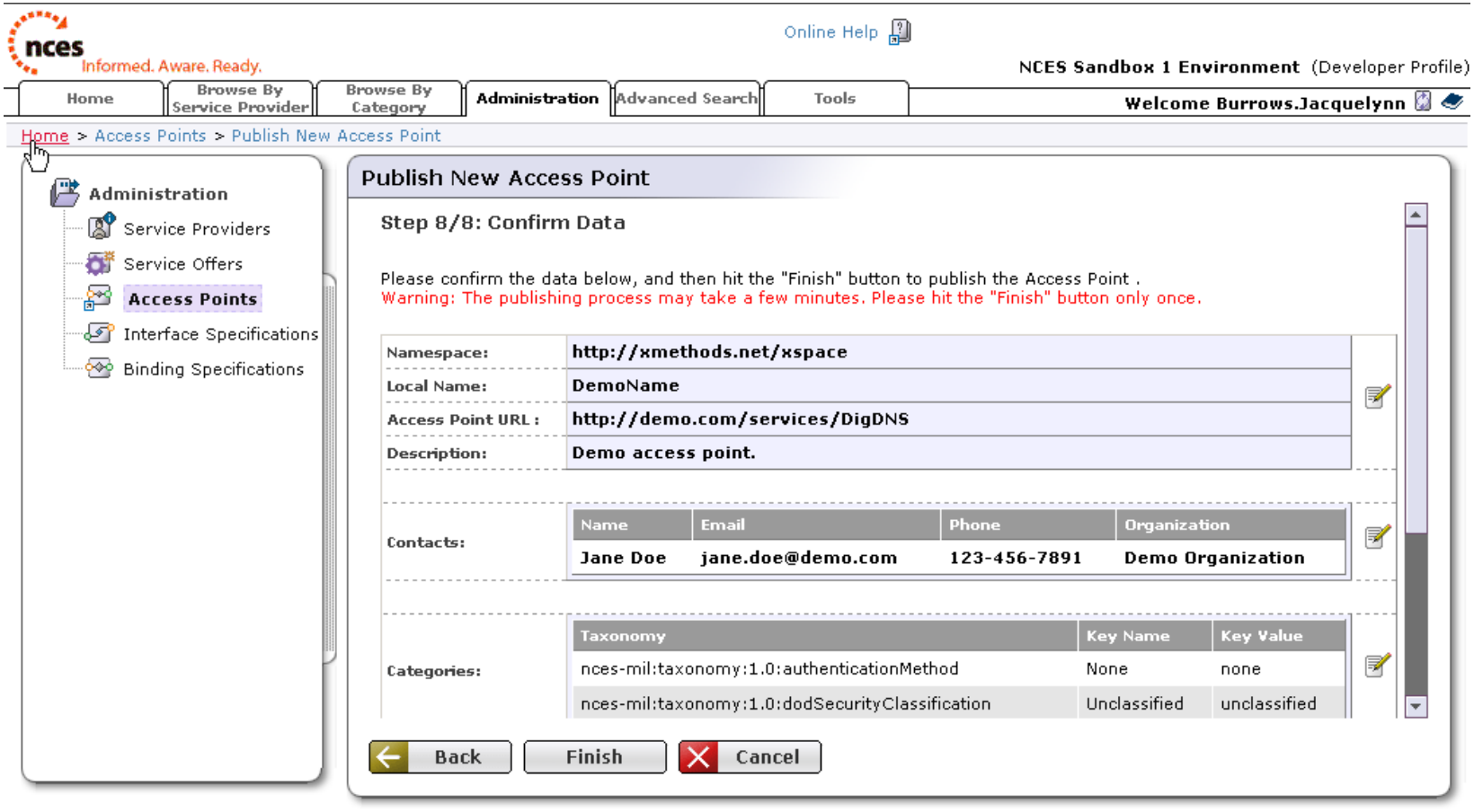
- **Select the binding specification that the access point provides. If the list becomes too long, the list will be split into multiple pages.**

Publish a New Access Point – Step Seven



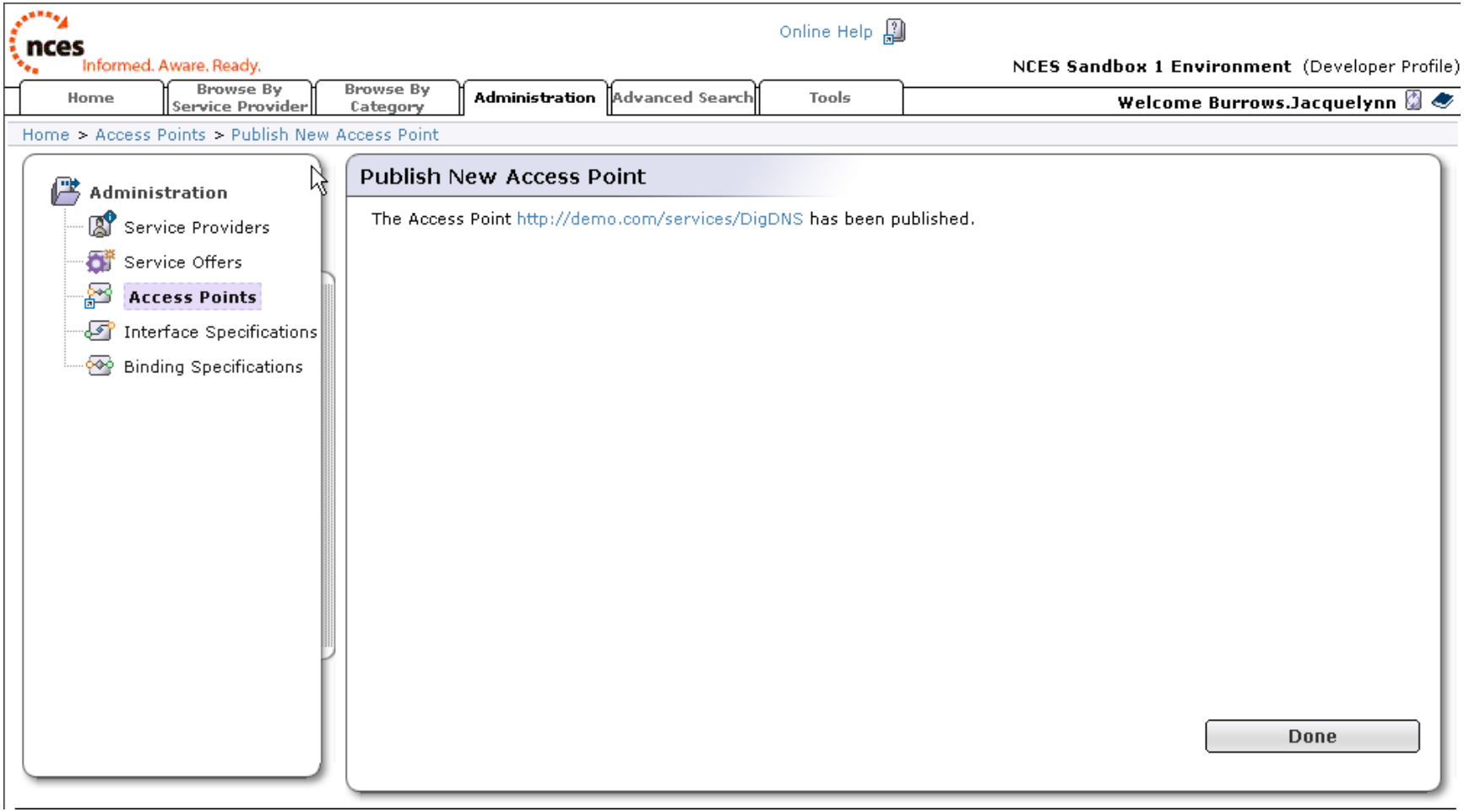
- **Set up the security policy for the access point through integration with the NCES Service Security component. If the access point is not integrated with NCES Service Security, this step may be skipped. For complete instructions on the access point security component, see the Access Point Security**

Publish a New Access Point – Step Eight



- **Review all the information entered for the access point during the publishing process. If a change is desired, click the corresponding edit icon to go to the detail view and update the information.**
- **After reviewing and confirming the data, click the Finish**

Publish a New Access Point – Confirmation

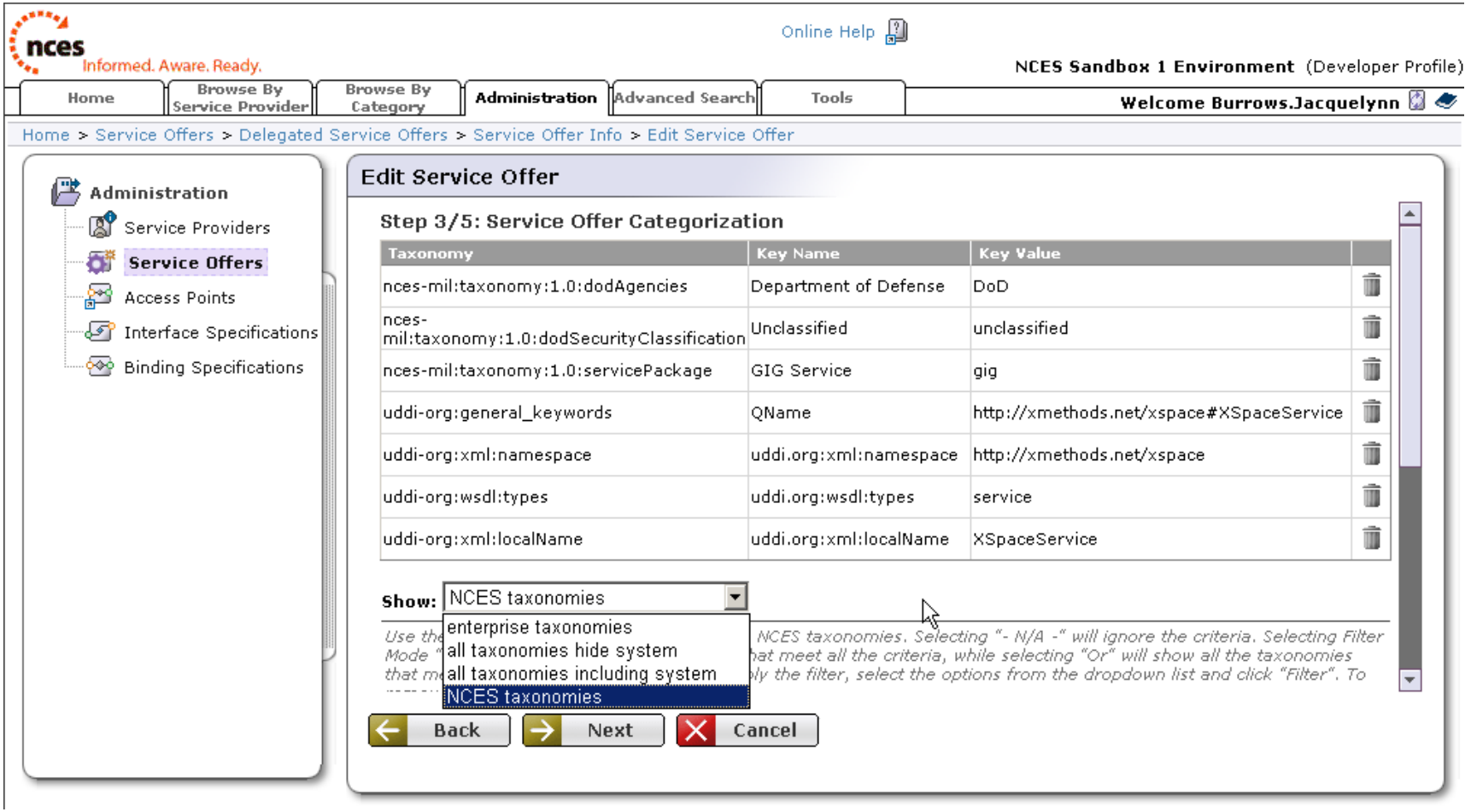


- **This page indicates that the access point has been published.**

Categorization Component

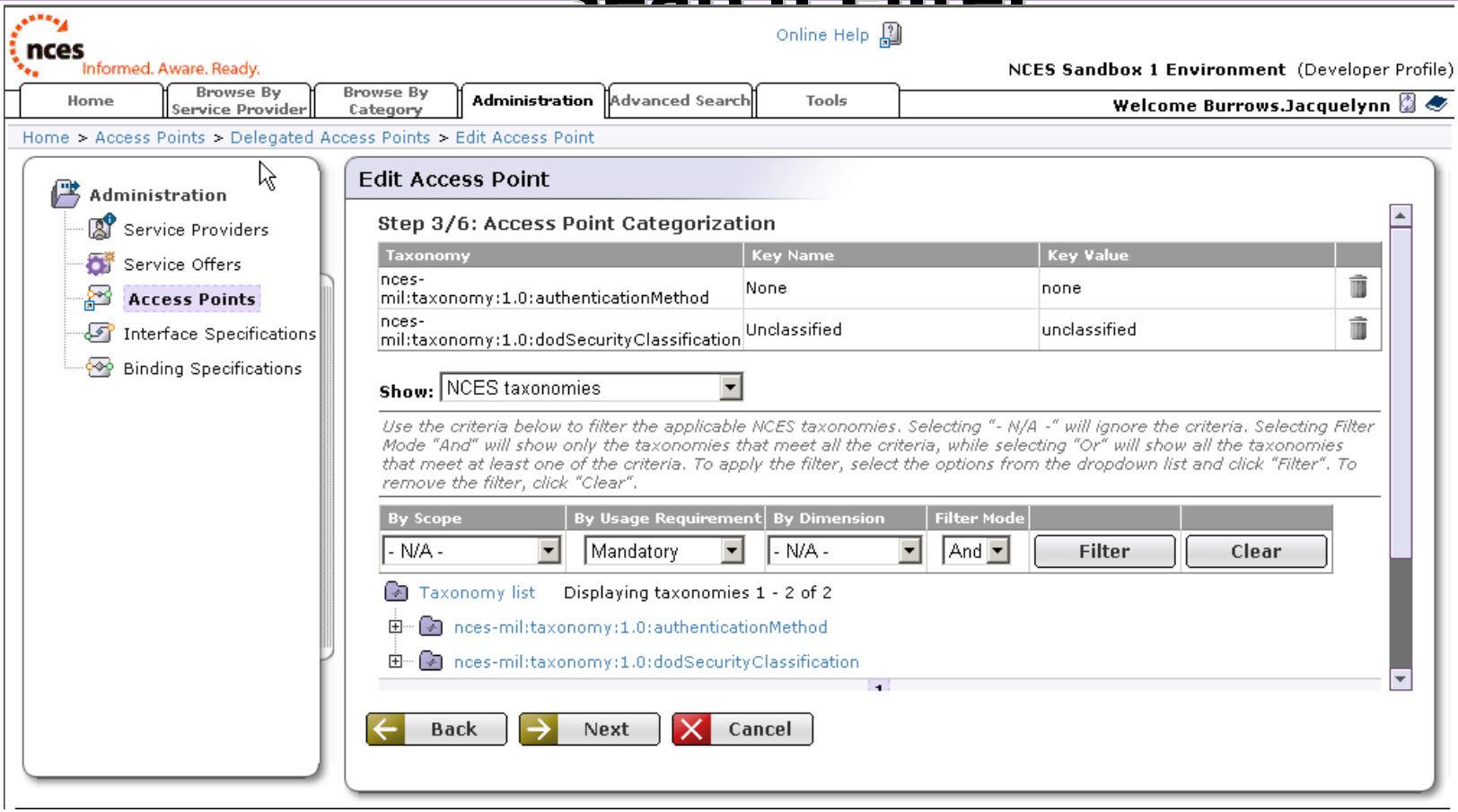
The categorization component is reused throughout the user interface. This section describes detailed instructions for using the categorization component.

Categorization Component - Service Offer Categories NCES Taxonomies



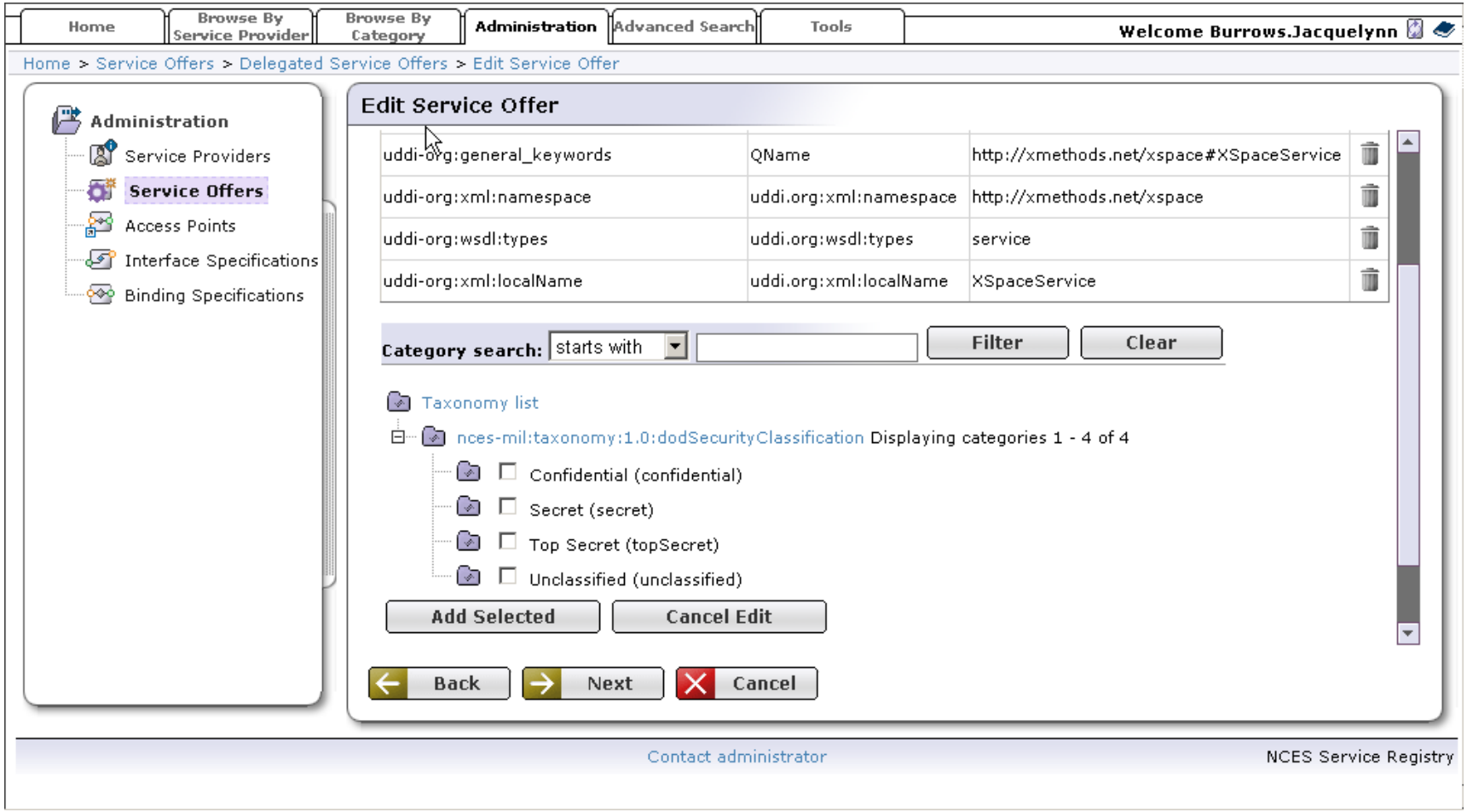
- **By default the categorization component displays NCES Taxonomies.**
- **To select other taxonomies, click the Show dropdown menu and select the desired type of taxonomies. The categorization step is required to complete the publishing of a service offer or**

Categorization Component - Service Offer Categories with Taxonomy Search Filter



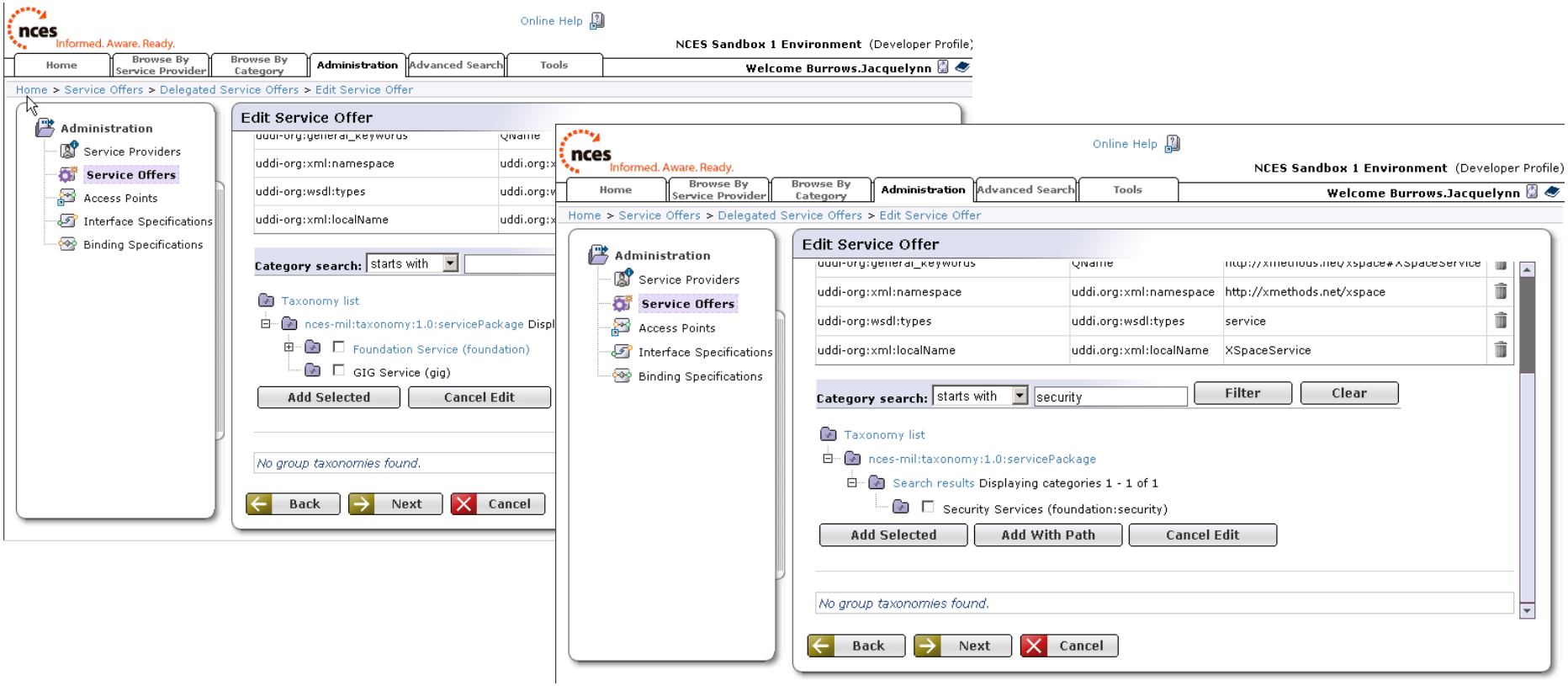
- **To search for a desired NCES taxonomy, specify the taxonomy filter criteria by choosing appropriate values from three drop down menus, choosing And or from the Filter Mode drop down menu and clicking the Filter button.** **Note: Selecting - N/A - will ignore the criteria and selecting the Filter Mode And option will show only the taxonomies that meet all the criteria while selecting Or will show all the taxonomies that meet at least one of the criteria. To**

Categorization Component - Selecting a Taxonomy



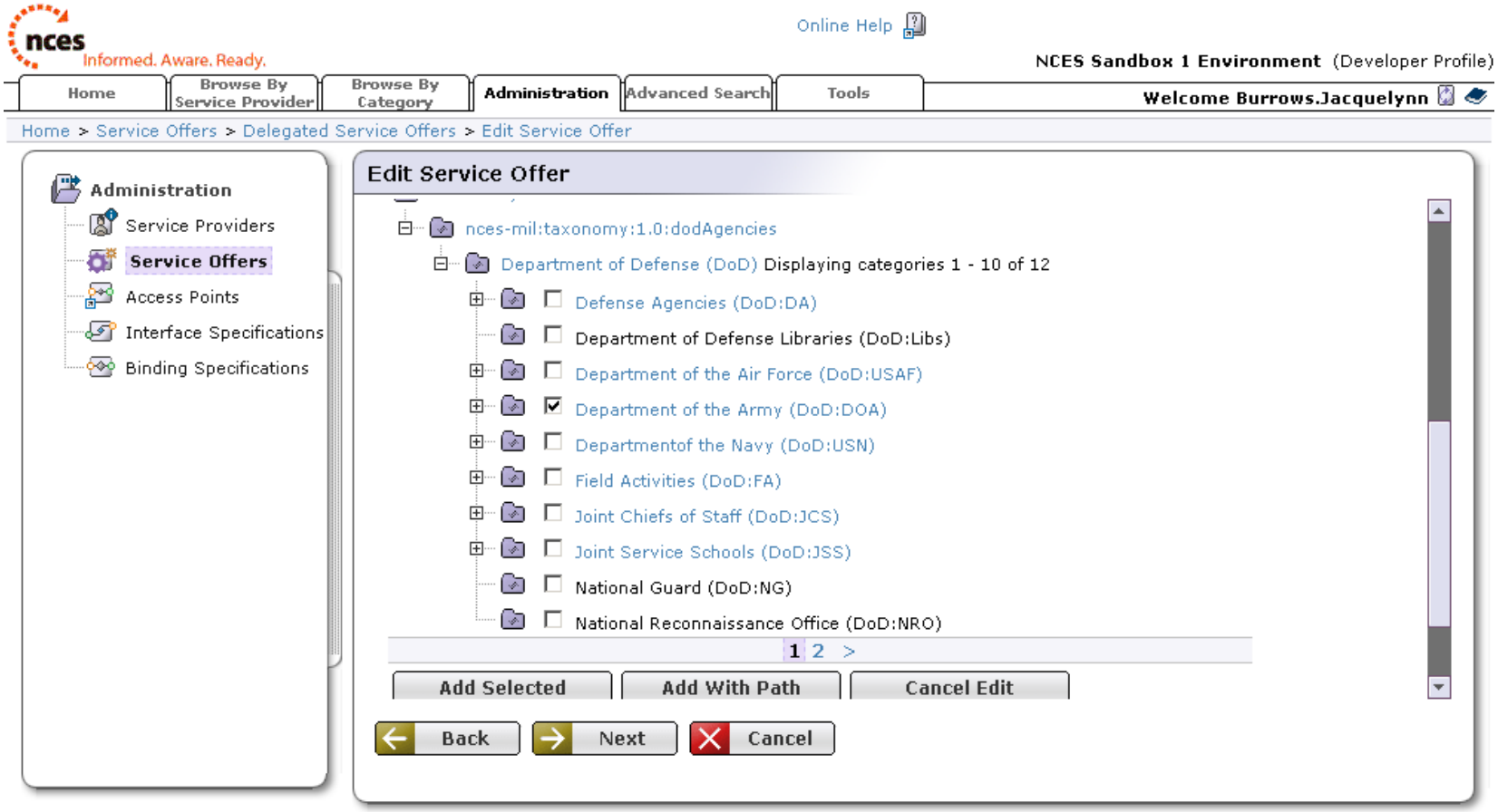
- **To select a taxonomy, traverse through the Taxonomy list tree and click the plus icon next to a tree node to expand the taxonomy.**

Categorization Component - Search Taxonomy Values



- **To browse the taxonomy, click the plus icon next to the taxonomy root to expand the taxonomy and click the plus icon next to a category node to expand a category (left screenshot).**
- **To search for a category value, select a string match option from the Category Search drop down menu and type a string in the Category Search field (right screenshot).**

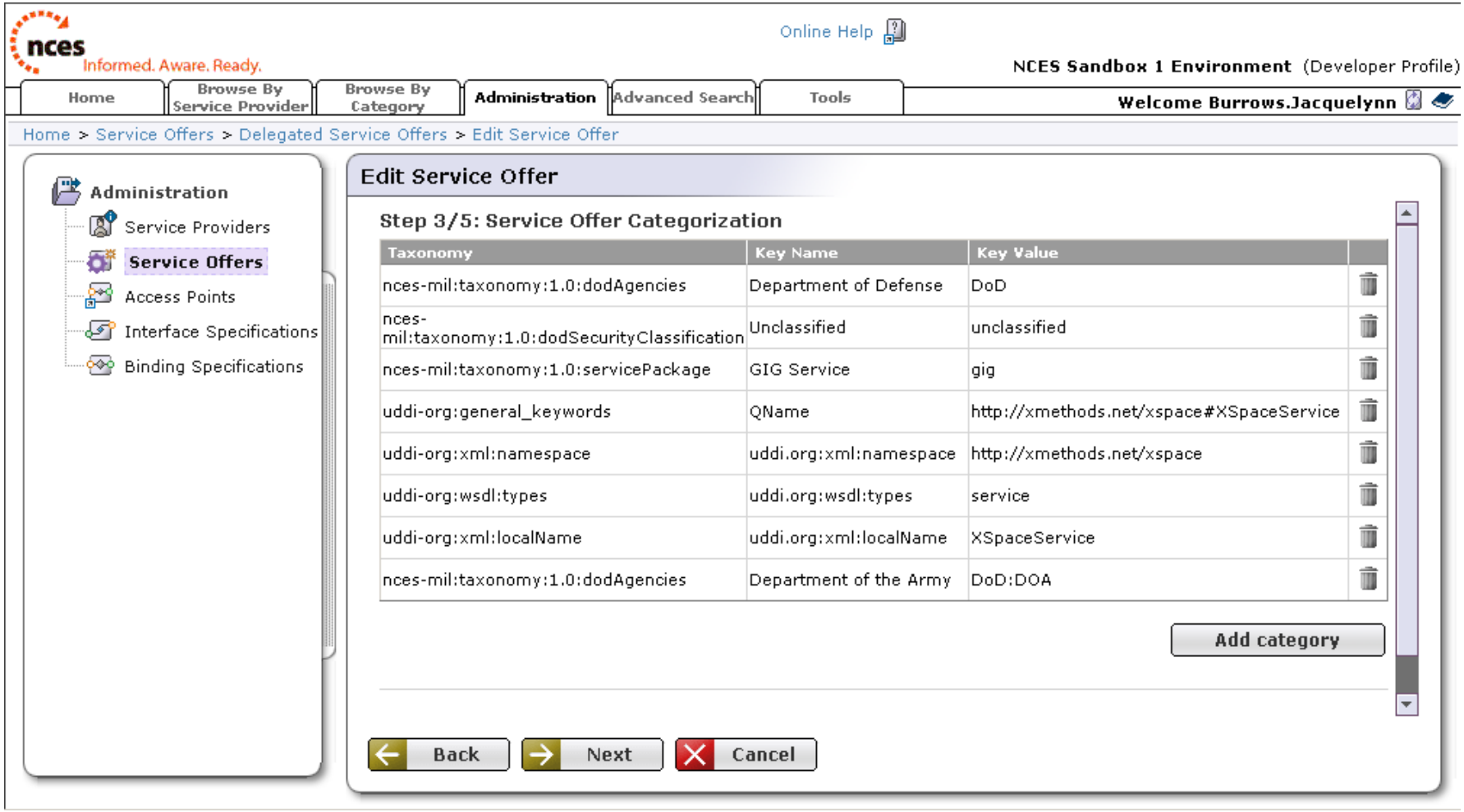
Categorization Component – Add Categorization



- **To select a category value, traverse through the taxonomy tree structure and click the check box next to the category value.**

Note: Multiple category values may be picked from a single taxonomy. After selecting the category values, click the Add Selected button to add the categories to the service offer. The Add with Path button may be used to add the selected categories and their parent values to the selected categorization.

Categorization Component – Delete Categorization

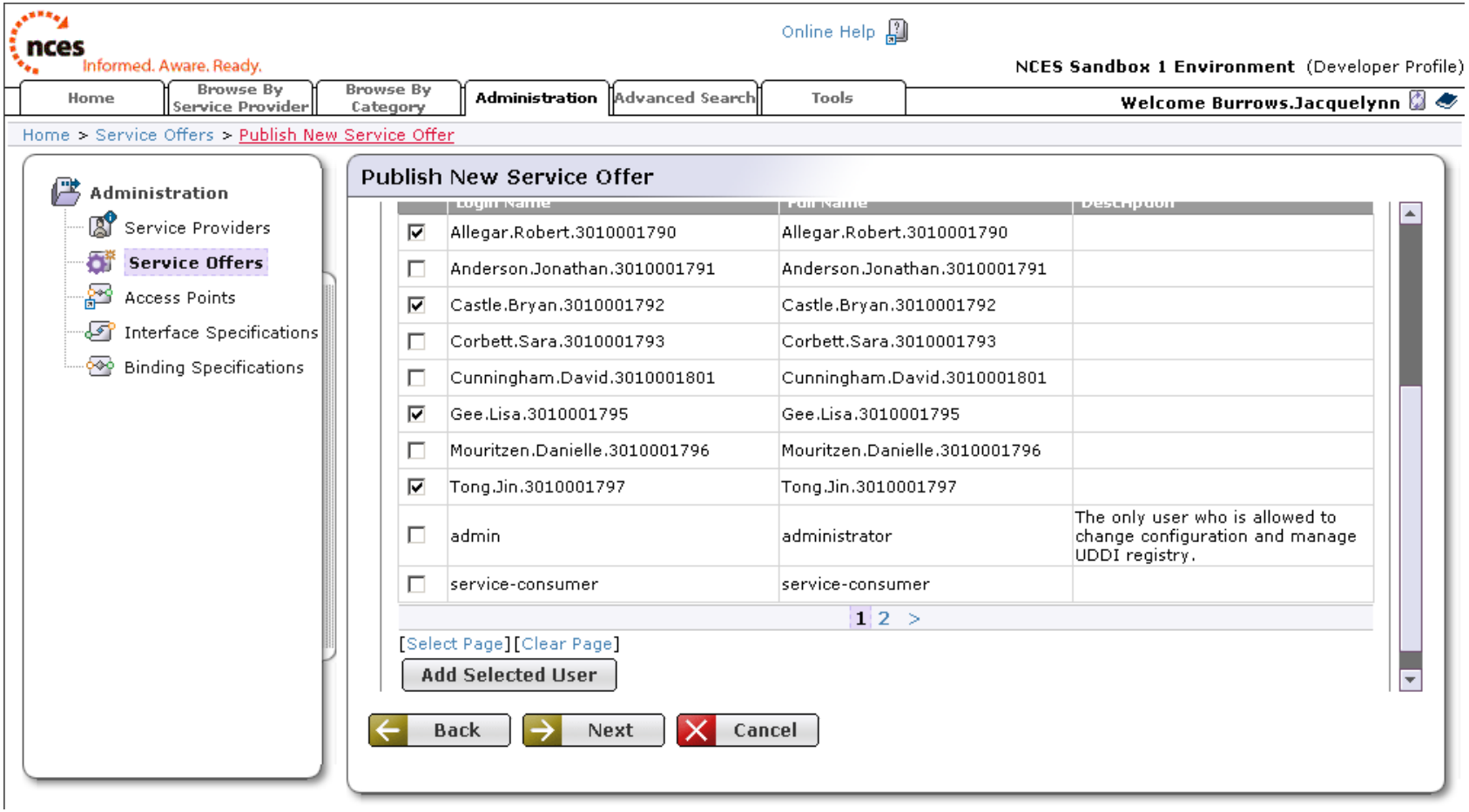


- **To delete categorization, click the trashcan icon for the categorization you wish to remove.**

Delegated Administration Component

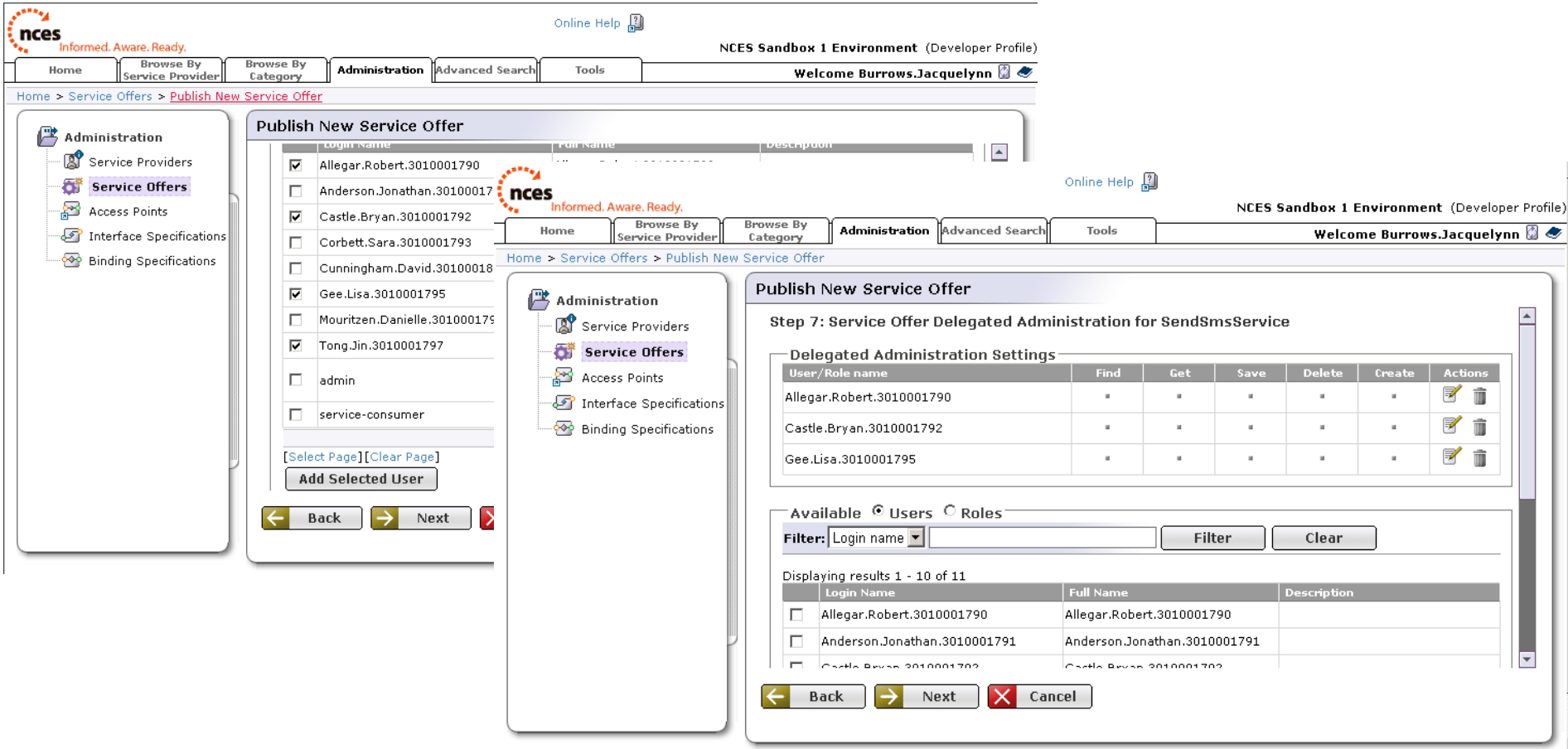
The delegated administration component is reused throughout the user interface. This section describes detailed instructions for using the delegated administration component.

Delegated Administration Component – Add Selected Users



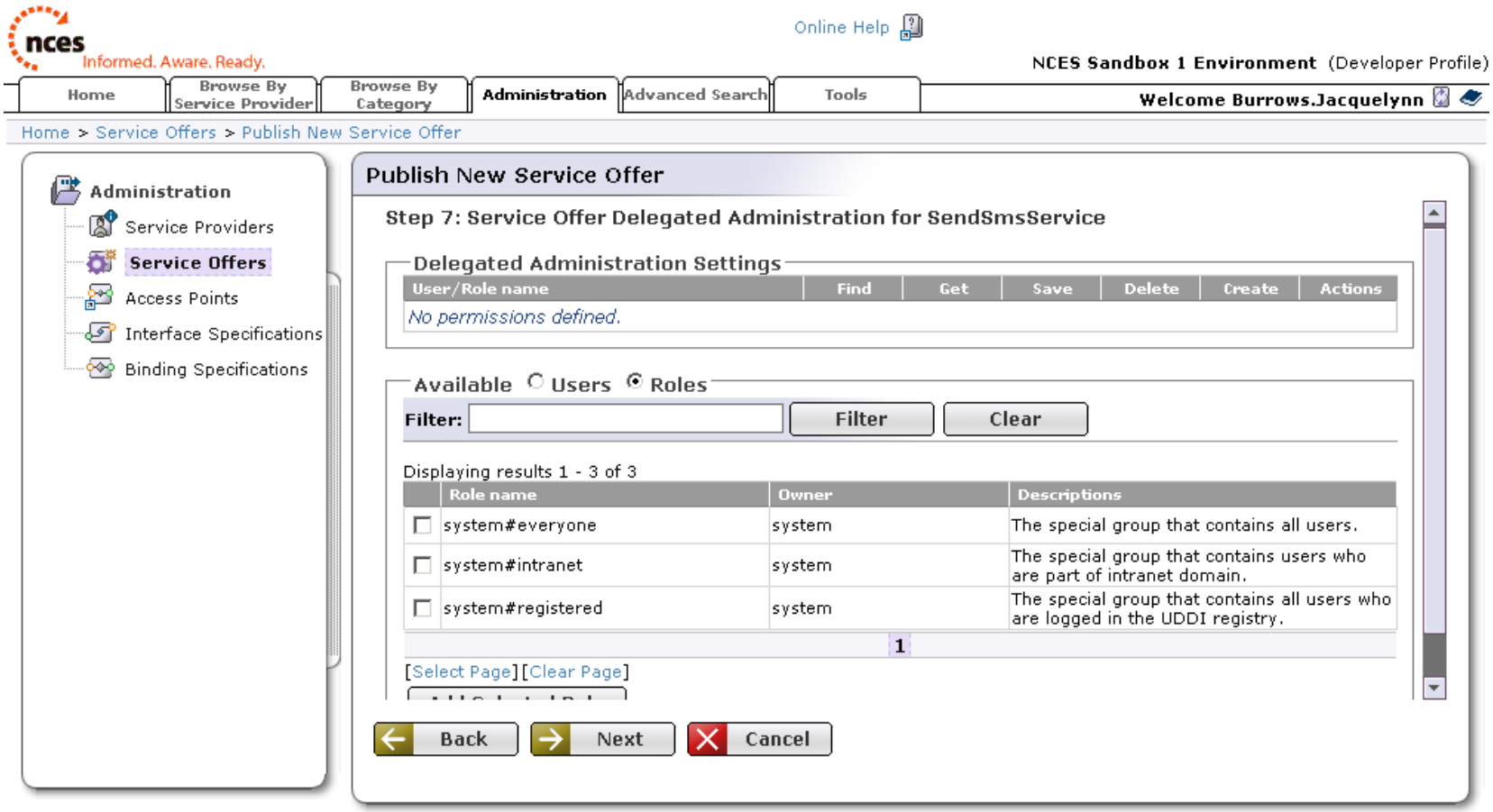
- To start setting up delegated administration, check the check box next to the desired users and click the Add Selected Users button.
- If the number of users grows too large, the list will be split in to multiple pages.

Delegated Administration Component – Add Selected Users



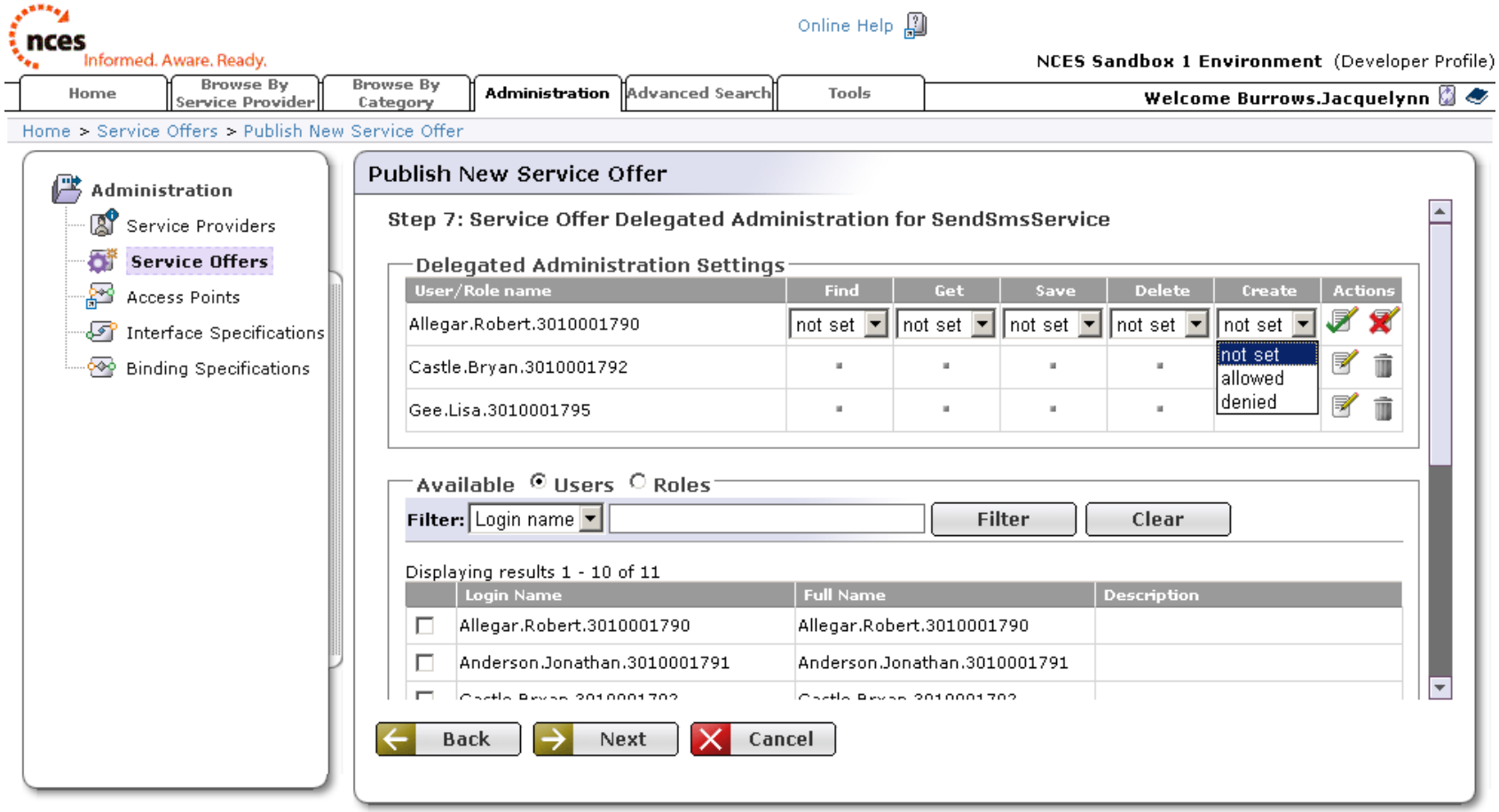
- **To start setting up delegated administration, check the check box next to the desired users and click the Add Selected Users button (left screen). If the number of users grows too large, the list will be split in to multiple pages.**
- **After clicking the Add Selected Users button, a screen similar**

Delegated Administration Component – Add Role



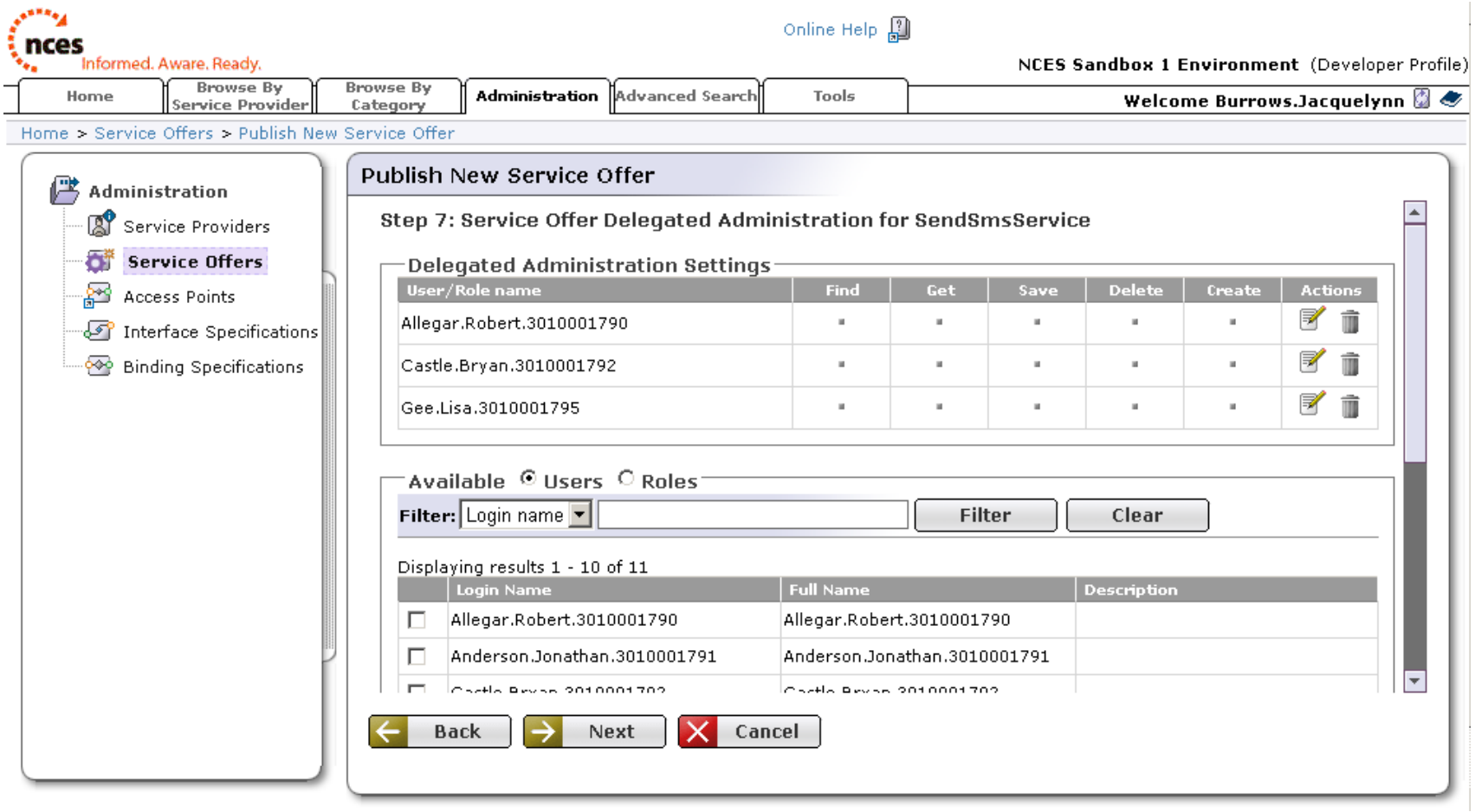
- **Adding roles may be accomplished by the same means as adding users. To display the roles, click the Roles radio button. The screen will reload with roles displayed instead of users. To return to adding users, click the Users radio button.**

Delegated Administration Component – Selecting Permissions



- **To edit the permissions for a selected user or role, click the edit icon on the row and select a permission option from the drop down menu for each permission column. The available values are allowed, denied, and not set.**
- **After choosing the desired permissions, click the green check**

Delegated Administration Component – Delete Users or Roles

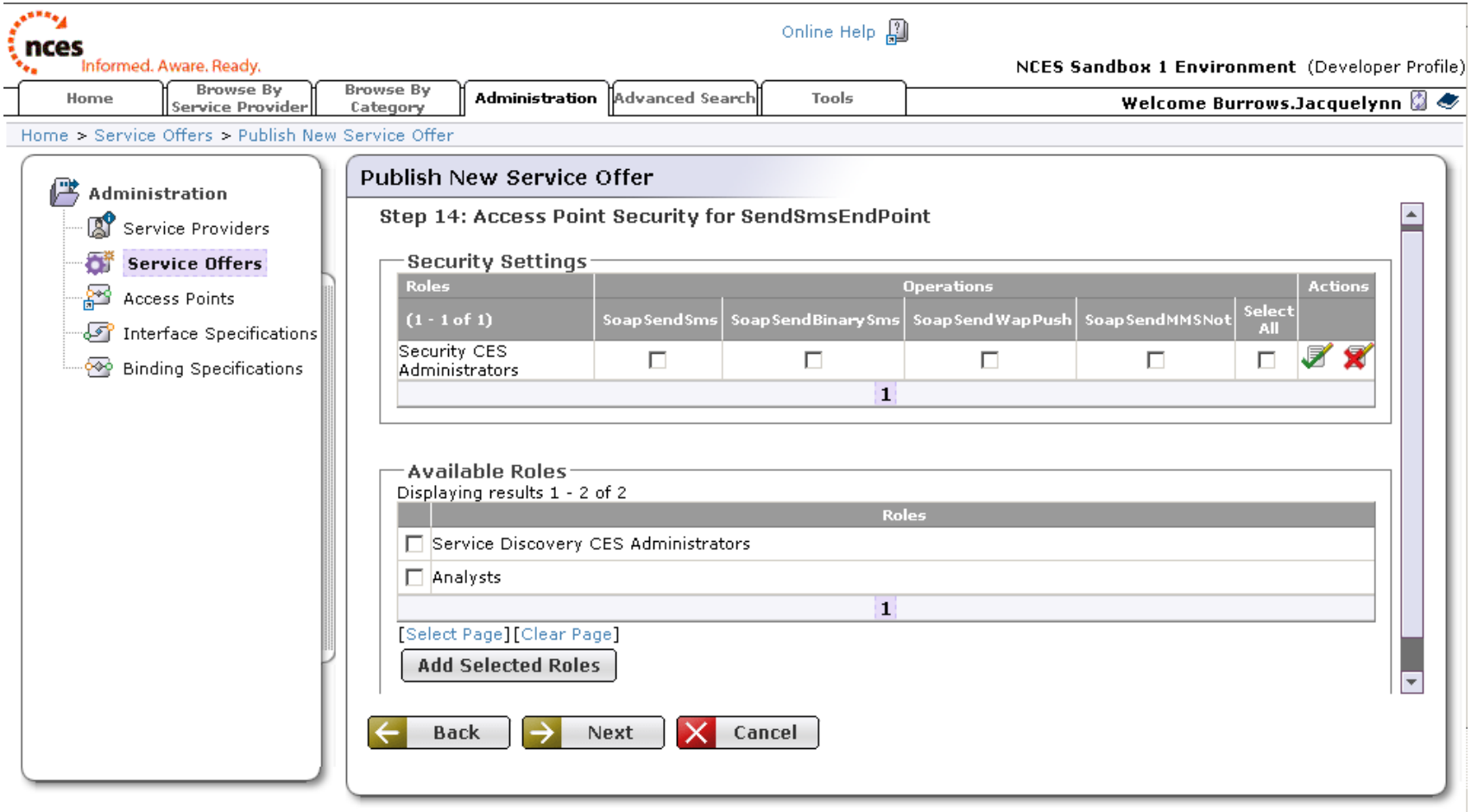


- **To remove a user or role from the permissions, click the trashcan icon for the user or role you wish to remove. The user or role will be removed from the delegated administration policy.**

Access Point Security Component

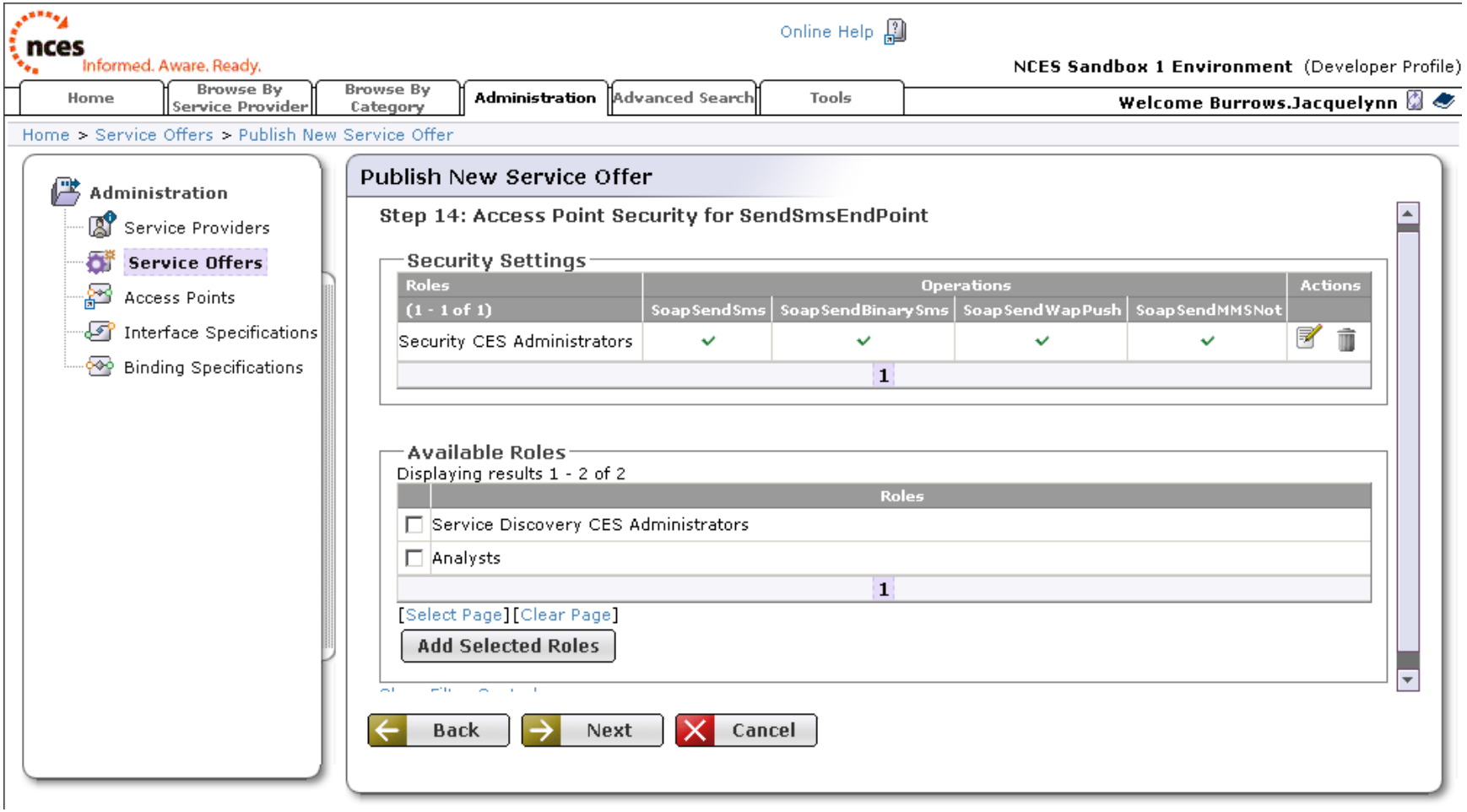
The access point security component allows the user to set up security policy for an access point through integration with the Service Security component. This section describes detailed instructions for using the access point security component.

Access Point Security Component – Assign Permission



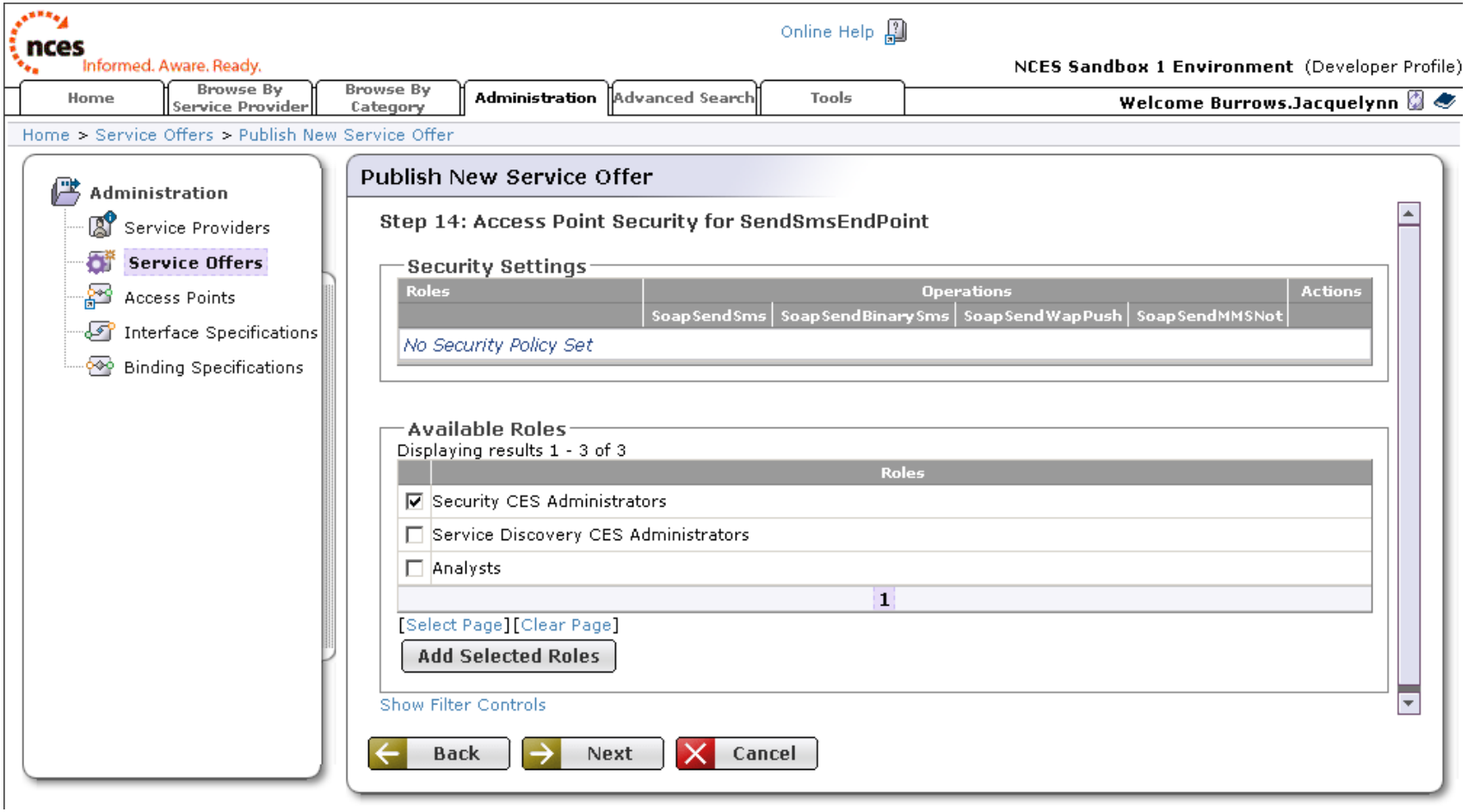
- **To edit the permissions of a role, click the edit icon of the role row in the Security Settings section and check the check box of the desired operation columns to grant the role the permission to invoke the operation provided at the access point.**

Access Point Security Component – Permission Granted



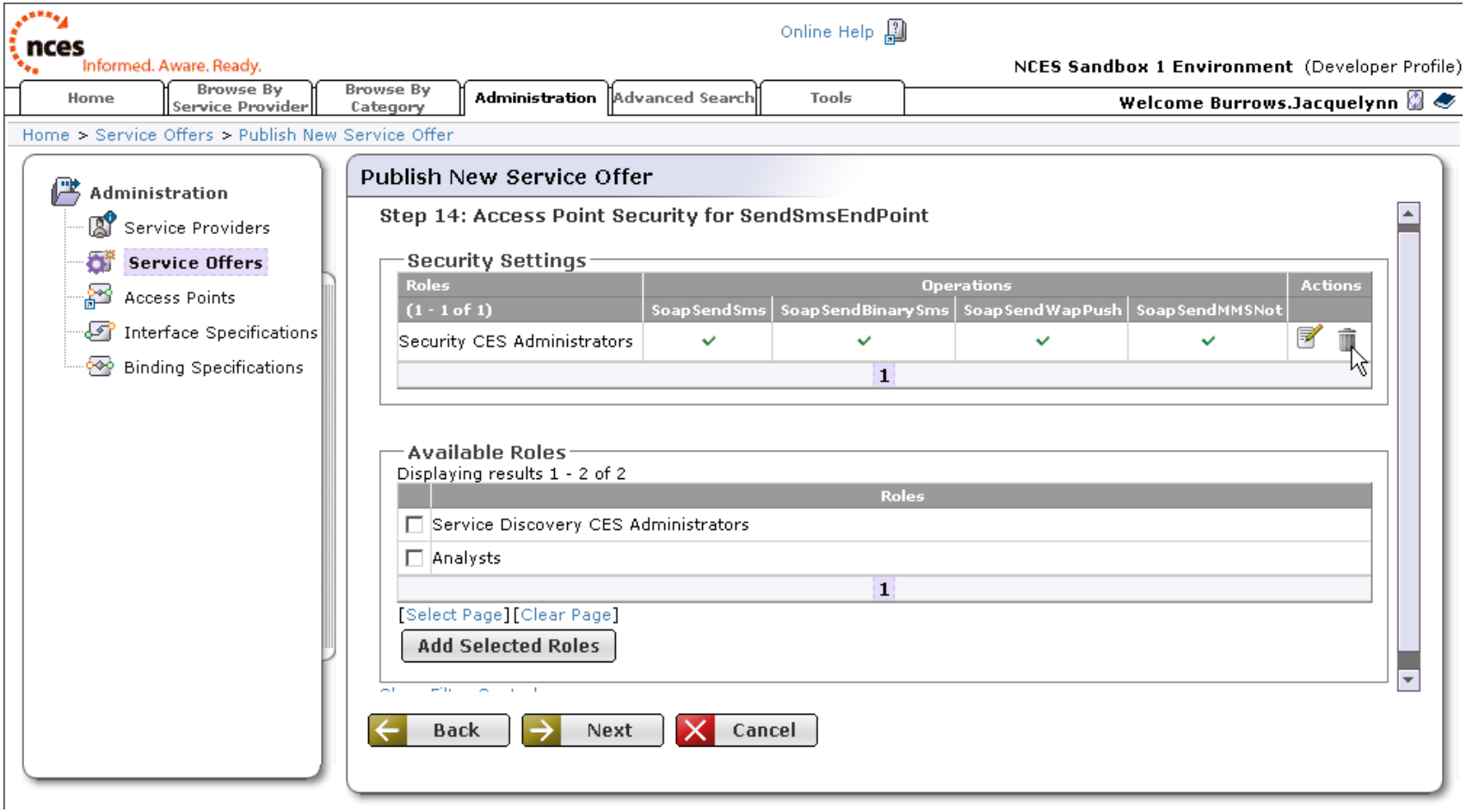
- **The screen above indicates that role Security CES Administrators has the permission to access all operations provided at the access point.**

Access Point Security Component – Add Selected Roles



- **To add a role to the policy set, check the check box next to the roles and click the Add Selected Roles button.**

Access Point Security Component – Deleting Roles



- **To delete a role from a policy, click the trash can icon associated with the role you wish to remove. The role will be removed from the policy.**

DEFENSE INFORMATION SYSTEMS AGENCY